STELLENT™

Content Server

User Guide

SCS-EN1-710

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Chapter

1

About This Guide

About This Guide

This Stellent Content Server User Guide provides information for end-users of the Stellent content management system. It covers the following main topics:

- What's New (see chapter 2)
- Stellent Content Management (see chapter 3)
- Getting Started (see chapter 4)
- Finding Files (see chapter 5)
- Working with Files (see chapter 6)
- Checking In Files (see chapter 7)
- Checking Out Files (see chapter 8)
- Working with Workflows (see chapter 9)

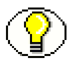
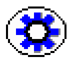
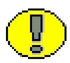
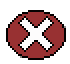
Conventions

The following conventions are used throughout this guide:

- The notation <*Install_Dir*> is used to refer to the location on your system where Stellent Content Server is installed.
- Forward slashes (/) are used to separate the directory levels in a path name. This is true when referring to files on a Windows file system or on a UNIX system. A forward slash will always appear after the end of a directory name.

Symbols

The following symbols are used throughout this guide:

Symbol	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

Chapter

2

WHAT'S NEW

OVERVIEW

This section highlights the new features in version 7.*x* of the Stellent Content Server software. For new information specific to developers and integrators, refer to the *What's New* sections in the appropriate reference material.

The following enhancements and features are implemented in Stellent Content Server 7.*x*:

❖ User Interface (page 2-1)

❖ Searching (page 2-2)

❖ Working with Content (page 2-2)

❖ Workflows (page 2-2)

USER INTERFACE

New user interface options are available for easily changing the navigation structure of the content server, as well as the information display of any search results. The default installation offers a tray and folder style hierarchy, but additional options include using menus located at the top of your browser, or a classic content server look-and-feel for those more familiar with our previous interface. For more information refer to Becoming Familiar with the Interface (page 4-12) and Personalizing the Interface (page 4-18).

Note: Web browsers on Macintosh operating systems are not supported with release 7.1 of Stellent Content Server and its add-on products.

SEARCHING

You have several new search options for finding content and working with the search results. By default, there is always a quick search field (page 5-3) available. A search tray (page 5-6) maintains a result listing in the tray area while you browse content or content information in the main page. You can also change the look of your search results page (page 5-28) dynamically, or set a new default search template using your user profile (page 4-18), to give you quick access to the information you need.

Your system administrator may also choose to use a new search engine instead of Verity for metadata searches and/or full-text searches. This is a choice made at installation. The choice made will affect how quickly you have access to content, and whether or not a quick search field is available. For more information refer to Searching by Metadata (page 5-11) and Searching for Specific Text (page 5-16), or see your system administrator.

WORKING WITH CONTENT

An Actions icon ( ) has been added to search results and workflow listings. Clicking it provides a contextual menu that shows actions you can take on the associated content item. The actions available to you will change depending on your access to content and the status of the content item. For more information refer to chapter 6 (*Working with Files*).

WORKFLOWS

Changes made to the workflow functionality of this release of Stellent Content Server affect how you access and review content in a workflow. Features have also been added that allow an administrator to create workflows with steps that may not involve the release of a content item, or content items in a workflow can be released while they are still in the workflow. This has the following benefits:

- It makes content available for searching during the workflow process.
- It permits multiple revisions of a content item within a workflow process.

For more information on workflows refer to chapter 9 (*Working with Workflows*).

Chapter

3

STELLENT CONTENT MANAGEMENT

This section covers the following topics:

STELLENT CONTENT SERVER

Stellent Content Server is an automated system for sharing, managing, and distributing business information using a website as a common access point. Current information can be accessed quickly and securely from any standard web browser. You can manage virtually any type of content—letters, reports, engineering drawings, spreadsheets, manuals, sales literature, and more—in one powerful content management system.

Note: This user guide describes the standard web pages and procedures that come with the "out-of-the-box" content server. However, Stellent Content Server is highly customizable, so your content server web pages might look quite different from those in this guide.

Content Repository

When you check in a file, Stellent Content Server stores the original, or *native*, file in a central repository for native files. If your system includes any conversion modules (page 3-4), a *web-viewable* version of the file (such as PDF) will be created and stored in a special repository for web-viewable files. (If you are not using a conversion module, or if a particular file type cannot be converted, a copy of the native file is placed in the repository for web-viewable files.)

A file that is checked into the content server is called a *content item*. Any user with the correct security permissions can view the web-viewable version of a content item or get a copy of the original file from the repository of native files. Security permissions determine who can view, revise, and delete a particular content item. For more information refer to Security (page 3-3).

The various types of files that can be associated with a single content item (the native file and any web-viewable files) are called *renditions*. For example, the PDF version of a content item is a rendition of that content item, as are the HTML and XML versions.

Revision Control

If you want to change a file that is checked into the content server, you need to check the content item out of the file repository. Only one person can have a content item checked out at any giventime, but others can still view the released version of the file.

When you are finished making changes to the file, you check it back into the content server, which automatically stores the new file as a new *revision* of the content item. Previous revisions remain available for you to view or copy, but the latest revision will always be displayed by default from content server web pages.

Every content item in the repository for web-viewable files has a *persistent URL*. This means that each content item has a unique web address that does not change from one revision to the next. Therefore, the most current version is always displayed when you point your browser to the URL of a content item.

Refer to Working with File Revisions (page 6-10) for more information.

METADATA

Metadata is information about a content item, such as the title, author, release date, etc. Metadata can be used to find content items in the content server, much as you would search for books in a library by author or subject. When you check in a content item, you will need to assign some of the metadata, while some metadata is assigned by Stellent Content Server automatically. The metadata is stored in a database that works in conjunction with Stellent Content Server.

Important: It is important that you understand your organization's metadata fields and always assign metadata carefully. Proper metadata makes content items easier to find, and ensures that only users who have the proper permissions can access a content item.

Refer to chapter 5 (*Finding Files*) for more information.

SECURITY

Stellent Content Server's security features are used to control which users can view, edit, and delete particular content items. With standard Stellent security, contributors must log in to the content server to be able to check in and check out files. Consumers who have access to secured files must also log in to the content server to be able to view the secured content.

When you check in a file, you may need to specify a value for the following security-related metadata fields:

❖ **Security group**
Each content server user is given a particular level of permission to each security group. When you specify the security group for a content item, only the users who have permission to that security group can work with that content item. The security group is a required metadata field for all content items.

❖ **Account**
Accounts are an optional feature that your system administrator can use to define a more flexible security model. Accounts are similar to security groups, in that only users who have permission to a particular account can work with content items that belong to that account.

USERS

Stellent Content Server is designed for two types of users:

- **Consumers**
  These are people who need to find, view, and print files from the content server repository. They do not have permission to create, modify, or delete files.
- **Contributors**
  These are people who need to create and revise files in the content server repository. They also have permission to find, view, and print files.

In many Stellent Content Server systems, the majority of users are consumers. To safeguard the integrity of files in the system, contributors need a user name and password to check content items in to and out of the content server repository.

Users who have full administrative permission are referred to as *system administrators*. Your organization may also assign limited administrative permission to certain users, such as the ability to set up user logins and create workflow templates. These users are referred to as *subadministrators*.

CONVERSION MODULES

Your content server system may include one or more conversion modules, which convert native files to web-viewable file formats. Most conversions take place automatically as soon as you check in a file.

The web-viewable formats of a file depend on the original file format of the content item and the conversion modules that are installed. For example, your system could be set up to convert Microsoft Word documents to the PDF format using the PDF Converter module, and to the HTML format using the Dynamic Converter module.

Some file formats cannot be converted, or your system administrator may configure the system to “pass through” certain types of documents without conversion. For example, a compressed zip file cannot be converted to a web-viewable format. In these cases, a copy of the native file is stored in the repository for web-viewable files.

INDEXING

Once a file has been converted to a web-viewable format or passed through to the repository for web-viewable files, the file is automatically "full-text indexed" by an indexing engine. The indexing engine makes a list of all the words in every file in HTML, PDF, TXT, XML, and other supported formats, and stores the list in a database. When you do a full-text search for content, Stellent Content Server looks up your search terms in this index. Once the indexing process is complete, the file is released to the content server.

FINDING CONTENT

Stellent Content Server provides two ways for users to find content:

❖ **Searching for content**
You can search for a content item by its metadata, by full-text, or by a combination of the two. Only the content items you have permission to view will be displayed in the search results.

❖ **Browsing content**
Browsing content using the **Browse Content** tray enables you to "drill down" to a content item by navigating through a set of hierarchical folders that are based on metadata. When you reach the last folder in a particular branch of the structure, content items that match the branch's metadata and that you have permission to view will be displayed on a search results page.

Refer to chapter 5 (*Finding Files*) for more information.

WORKFLOWS

The workflow process routes a file for review and approval before it is released to the content server repository. Users are notified by e-mail when they have a file to review.

Two types of workflows can be created in Stellent Content Server:

❖ In a **criteria** workflow, files automatically go into a workflow if the values entered in the metadata fields upon check-in meet certain criteria. Criteria workflows are useful for individual content items that are approved by the same reviewers on a regular basis (newsletter articles, for example).

- In a **basic** workflow, files are specifically identified in the workflow, along with the contributors, reviewers, and steps. This type of workflow requires an administrator to initiate the process, and is best suited for groups of content items that need to go through a workflow together or individual content items with unique workflow requirements.

Refer to chapter 9 (*Working with Workflows*) for more information.

Chapter

4

GETTING STARTED

OVERVIEW

This section covers the following topics:

WORKING WITH YOUR WEB BROWSER

This section covers the following topics:

Supported Web Browsers

Consumers and contributors access Stellent Content Server from a standard web browser. The computer you use to access the content server is referred to as a *client computer*. Stellent Content Server can be accessed from any of the following web browsers on a client computer:

Browser	Versions
Microsoft Internet Explorer	5.0, 5.01, 5.5 SP2, 6.0 SP1 *(see notes below)*
Netscape Communicator	4.75, 4.76, 4.78, 4.79 *(see notes below)*
Netscape	6.1, 6.2, 6.2.2, 7.*x* *(see notes below)*
Mozilla	1.4, 1.5

Note: This documentation assumes you are using the default Trays layout, which is currently not compatible with **Internet Explorer 5.0 and 5.01**.
Netscape Communicator 4.7*x* and **Netscape 6.*x*** only support the Classic layout, not the Trays and Top Menus layouts.

Important: There are issues if you are running **Netscape 6.*x* and 7.*x*** on a client computer and the Content Server application uses applets (for example, the multiple-file upload applet or any of the administration applets). This is because by default Netscape 6.*x* and 7.*x* use Sun's JDK 1.3/1.4 Java plug-in, which is known to have compatibility issues with Stellent Content Server. These issues are related to authentication when launching an applet for the first time and applets closing when the parent window is changed.
There are no problem if you use JDK 1.1 with Netscape (which is the default for Netscape's 4.7*x* releases).

Important: Web browsers on Macintosh operating systems are not supported with release 7.*x* of Stellent Content Server and its add-on products.

Configuring Your Web Browser

To ensure that Stellent Content Server works properly, configure your web browser according to one of the following procedures:

- Configuring Internet Explorer 5.x (page 4-3)
- Configuring Internet Explorer 6.0 (page 4-3)
- Configuring Netscape Communicator 4.7x (page 4-3)
- Configuring Netscape 6.1 and 6.2 (page 4-4)
- Configuring Netscape 7.x (page 4-4)

- ❖ Configuring Mozilla 1.4 and 1.5 (page 4-4)
- ❖ Setting Up Helper Applications and Plug-ins (page 4-5)

Configuring Internet Explorer 5.*x*

If you are using Microsoft Internet Explorer 5.*x* as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Tools—Internet Options**.
3. On the Security tab, click the web content zone that your content server is in (usually “Internet” or “Local intranet”; contact your system administrator for the correct zone).
4. Click **Custom Level**.
5. Under **Cookies—Allow Cookies that are stored on your computer**, select the “Enable” option.
6. Click **OK**.
7. Click **OK** to save the settings.

Configuring Internet Explorer 6.0

If you are using Microsoft Internet Explorer 6.0 as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Tools—Internet Options**.
3. On the Privacy tab, make sure that the privacy setting slider is not set to the highest level (**Block All Cookies)**. Any of the other options is acceptable.
4. Click **OK** to save the settings.

Configuring Netscape Communicator 4.7*x*

If you are using Netscape Communicator 4.7*x* as your web browser, complete the following steps:

1. Start the web browser.
2. Choose **Edit—Preferences**.

3. Select the Advanced category.
4. In the Cookies pane, select the “Accept all cookies” or “Accept only cookies that get sent back to the originating server” option.
5. Click **OK** to save the settings.

Configuring Netscape 6.1 and 6.2

If you are using Netscape 6.1 or 6.2 as your web browser, complete the following steps:

1. Start the web browser.
2. Select **Edit—Preferences**.
3. Expand the **Privacy & Security** category, and select **Cookies**.
4. Select any of the cookies options except for “Disable cookies.”
5. Click **OK** to save the settings.

Configuring Netscape 7.*x*

If you are using Netscape 7.*x* as your web browser, complete the following steps:

1. Start the web browser.
2. Select **Edit—Preferences**.
3. Expand the **Privacy & Security** category, and select **Cookies**.
4. Select any of the cookies options except for “Disable cookies.”
5. Click **OK** to save the settings.

Configuring Mozilla 1.4 and 1.5

If you are using Mozilla 1.4 and 1.5 as your web browser, complete the following steps:

1. Start the web browser.
2. Select **Edit—Preferences**.
3. Expand the **Privacy & Security** category, and select **Cookies**.
4. Select any of the cookies options except for “Disable cookies.”
5. Click **OK** to save the settings.

Setting Up Helper Applications and Plug-ins

To view content items on a client computer, you may need to install and configure helper applications or web browser plug-ins for specific file formats. For example, if content items are being converted to PDF files (using Stellent PDF Converter), the Adobe Acrobat plug-in needs to be installed and configured for your web browser according to one of the following procedures:

❖ Configuring Adobe Acrobat 4.x (page 4-5)

❖ Configuring Adobe Acrobat 5.x (page 4-5)

❖ Configuring Adobe Acrobat 6.x (page 4-6)

Configuring Adobe Acrobat 4.*x*

If you are using Adobe Acrobat 4.*x* or Adobe Acrobat Reader 4.*x*, complete the following steps:

1. Start Adobe Acrobat Reader or Adobe Acrobat.
2. Select **File—Preferences—General**.
3. Clear the “Use Greek Text Below *x* Pixels” check box.
4. Click **OK**.

Configuring Adobe Acrobat 5.*x*

If you are using Adobe Acrobat 5.*x* or Adobe Acrobat Reader 5.*x*, complete the following steps:

1. Start Adobe Acrobat Reader or Adobe Acrobat.
2. Select **Edit—Preferences**.
3. Select **Display**.
4. Clear the “Use Greek Text Below *x* Pixels” check box.
5. Click **OK**.

Configuring Adobe Acrobat 6.*x*

If you are using Adobe Acrobat 6.*x* or Adobe Acrobat Reader 6.*x*, complete the following steps:

1. Start Adobe Acrobat Reader or Adobe Acrobat.
2. Select **Edit—Preferences**.
3. Select **Page Display**.
4. Clear the “Use greek text below *x* Pixels” check box.
5. Click **OK**.

LOGGING IN TO STELLENT CONTENT SERVER

This section covers the following topics:

About Login

Each time that you open a web browser window to gain access to Stellent Content Server, you need to log in from the *portal page*. Your system administrator should provide you with the URL of the content server portal page (for example, *http://your_server/stellent*).

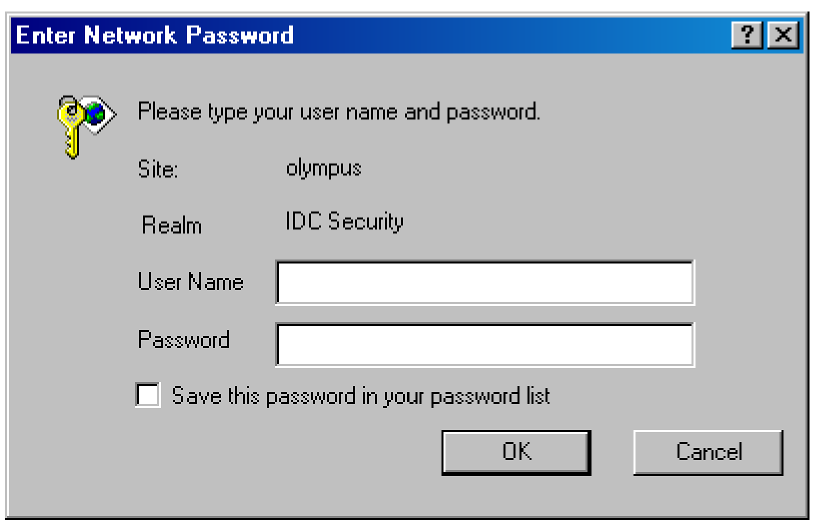
Your login method depends on the security model your organization has set up:

- Stellent Content Server standard security uses the **Login link** on the Stellent portal page.
- Microsoft Network security uses the **Microsoft Login** link on the Stellent portal page. The Microsoft Login link appears on portal page only if your organization is using Microsoft Network security to log in to Stellent Content Server. If your organization is using Microsoft Network security, then you are automatically authenticated into Stellent Content Server when you log in to the Microsoft network; you will not need to enter a user name and password.
- Self-registration enables you to create your own Stellent Content Server user name and password. If your organization is using self-registration, a **Self-Registration** link appears on the portal page. After you have self-registered, you will use the Login link to log in for future content server sessions.

Note: Once you are logged in, you will not be asked to log in again as long as the browser window stays open. Even if you go to other websites, you will be logged in automatically if you come back to the content server.

Login Screen

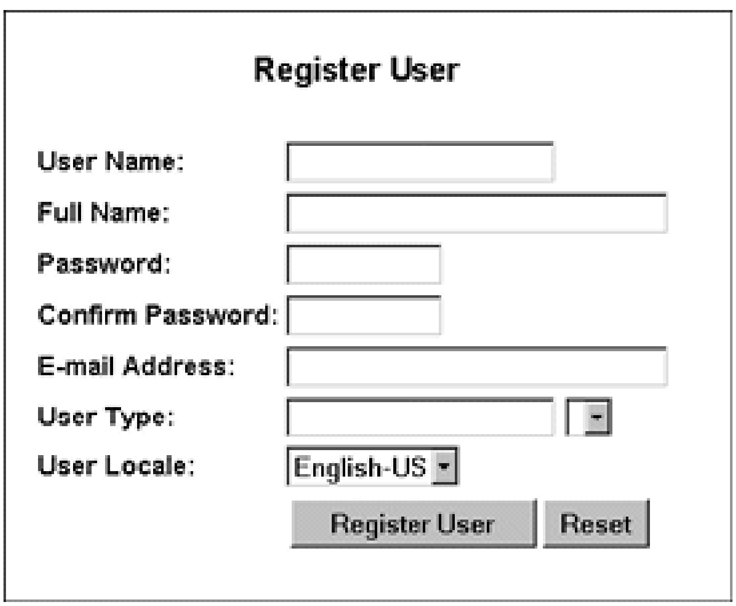
The Login screen is used to enter your content server user name and password. This screen is accessed by clicking the **Login** link on the Stellent portal page.



Feature	Description
User Name field	Enter your content server login user name.
Password field	Enter your content server login password.
"Save this password in your password list" check box	**Selected—**The current user name and password will be filled in automatically the next time you log in to the content server from this client computer. **Clear—**The user name and password fields will be blank the next time you log in to the content server from this client computer. This check box appears only in Internet Explorer.
OK button	Logs in to the content server with the specified user name.
Cancel button	Cancels the login.

Register User Page

The Register User page is used to define your user information during self-registration. This screen is accessed from the **Self-Registration** link on the Stellent portal page.



Feature	Description
User Name field	Enter a user name. This is the user name you will use to log in to the content server.
Full Name field	Enter your full name. This name will appear in various locations in the content server user interface.
Password field	Enter your content server password. Asterisks are displayed for security reasons.
Confirm Password field	Re-enter your password in this field to confirm that you entered it correctly. Asterisks are displayed for security reasons.
E-mail Address field	Enter your e-mail address. This address will be used for workflow and subscription notifications.
User Type field	This is an identifier that can be used by the system administrator to place users in groups. **This field should not be changed.**
User Locale field	This sets the language and date/time format displayed on content server pages. If the system administrator has enabled more than one locale option, you can select the locale that you prefer.
Custom user information fields	If your system administrator has created custom user information fields, you might be able to specify additional information that will be stored with your user login.
Register User button	This creates your user login.
Reset button	This resets all fields to their default values.

Logging in with a Content Server User Login

Use the following procedure to log in to Stellent Content Server using a standard content server user login:

1. Start your web browser.
2. Point your browser to the URL for your organization's content server portal page. An example of a URL is *http://server/stellent*.

   The content server portal page is displayed.
3. Click the **Login** link on the portal page.

   The Login screen (page 4-7) is displayed.
4. Enter your content server user name and password. For security purposes, an asterisk appears for each character you type in the Password field.
5. Click **OK**.

   If you entered a correct user name and password, the content server home page (page 4-16) is displayed.

See Also

– *Logging in with a Windows User Login (page 4-10)*

– *Self-Registering (page 4-11)*

Logging in with a Windows User Login

Use the following procedure to log in to Stellent Content Server using your Windows user login:

Note: You can log in using your Windows user login only if the system administrator has enabled the Microsoft Network login function on your system.

1. Start your web browser.
2. Point your browser to the URL for your organization's content server portal page. An example of a URL is *http://server/stellent*.

   The content server portal page is displayed.
3. Click the **Microsoft Login** link on the portal page.

If you entered a correct user name and password, the content server home page (page 4-16) is displayed.

See Also

– *Logging in with a Content Server User Login (page 4-10)*

– *Self-Registering (page 4-11)*

Self-Registering

Use the following procedure to create your own Stellent Content Server user name and password:

Note: You can self-register only if the system administrator has enabled self-registration on your system.

1. Start your web browser.
2. Point your browser to the URL for your organization's content server portal page. An example of a URL is *http://server/stellent*.

   The content server portal page is displayed.
3. Click the **Self-Registration** link on the portal page.

   The Register User page (page 4-8) is displayed.
4. Enter a user name and password, and re-enter the password in the Confirm Password field.
5. Specify additional user information, such as your full name, e-mail address, and user locale.
6. Click **Register User**.

   A success message and Login link are displayed.
7. To log in to the content server, click the **Login** link.

   The Login screen (page 4-7) is displayed.
8. Enter your content server user name and password. For security purposes, an asterisk appears for each character you type in the Password field.
9. Click **OK**.

   If you entered a correct user name and password, the content server home page (page 4-16) is displayed.

Note: To log in to the content server in the future, use the **Login** link in the portal navigation bar. See Logging in with a Content Server User Login (page 4-10).

See Also

– *Logging in with a Content Server User Login (page 4-10)*

– *Logging in with a Windows User Login (page 4-10)*

BECOMING FAMILIAR WITH THE INTERFACE

This section covers the following topics:

Interface Overview

This section provides an overview of the standard Stellent Content Server web pages, and describes how to use the navigation features of the interface.

For consumers and contributors, there are four main interface features in Stellent Content Server:

❖ Portal Navigation Bar (page 4-13)

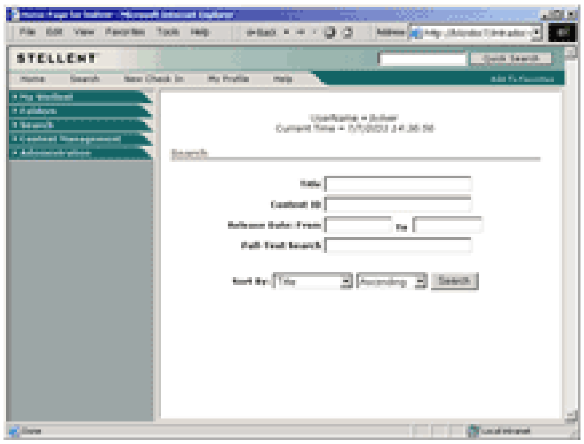
❖ Toolbar (page 4-15)

❖ Home Page (page 4-16)

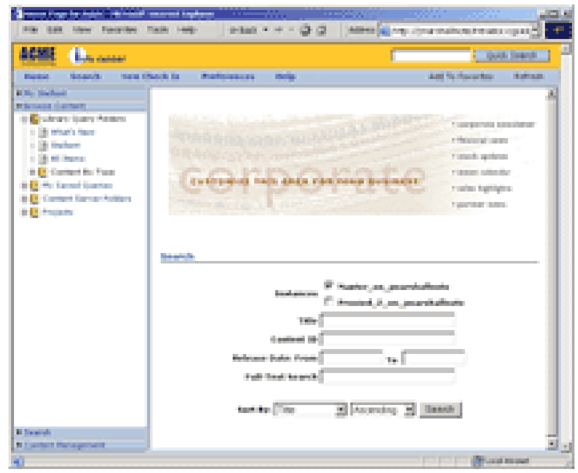
❖ Content Management Tray (page 4-16)

Customized Web Pages

The Stellent Content Server interface is highly customizable, so your content server web pages might look different than those described throughout this guide. For example, you may see special colors, icons, and logos, or your system administrator may choose to add, change, or hide functions on certain pages. Contact your system administrator for user documentation specific to your content server system.



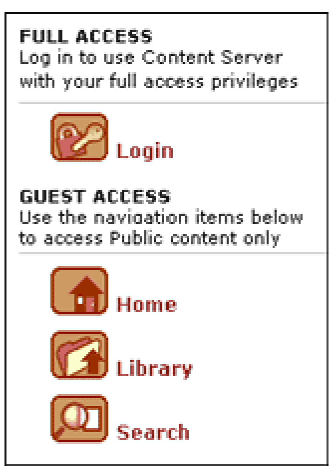
Standard content server home page



Customized content server home page

Portal Navigation Bar

The *portal navigation bar* is displayed on the left side of all Stellent Content Server web pages. This is your primary navigation tool, and it can be personalized with functions you use often, such as predefined searches and links to your favorite websites.



Portal navigation page before login

Tray navigation after login

Link	Description
Links in the portal navigation bar before login	
Login	Displays the Login screen (page 4-7), where you enter your user name and password to log in to the content server. If you are already logged in, the Login link will not appear in the portal navigation bar.
Home	Displays the Home page (page 4-16).
Library	Displays the content server's hierarchical link structure (page 5-3). You can "drill down," or browse through, folders in this hierarchy to find specific files.
Search	Displays the Search tray (page 5-6). From this page, you can perform metadata and full-text searches to find specific files.
Microsoft Login	If you are already logged in to your Microsoft network, clicking this link logs you in to the content server. This link is displayed only if your organization is using Microsoft Network security to log in to Stellent Content Server.
User Profile	Displays your user profile (page 4-18).
Content Manager	Displays the Content Management tray (page 4-16). This link is displayed only if you have contributor permission.
Administration	Displays the Administration page, which contains the content server administration applets. This link is displayed only if you have administration applets.
Links in the portal navigation bar after login	
My Stellent	Expands to display links to personal URLs, saved queries, user profile, checked-out content, workflow assignments, and subscriptions.

Link	Description
Browse Content	Expands to display a hierarchical link structure and any other special folders configured by the system administrator.
Search	Expands to provide several options for finding content and includes a tab for viewing search results.
Content Management	Expands to display several links for managing content, such as new check-in, checked-out content (by all users or the current user), work in progress, active workflows, and expired content. This link is displayed only if you have contributor permission.

Toolbar

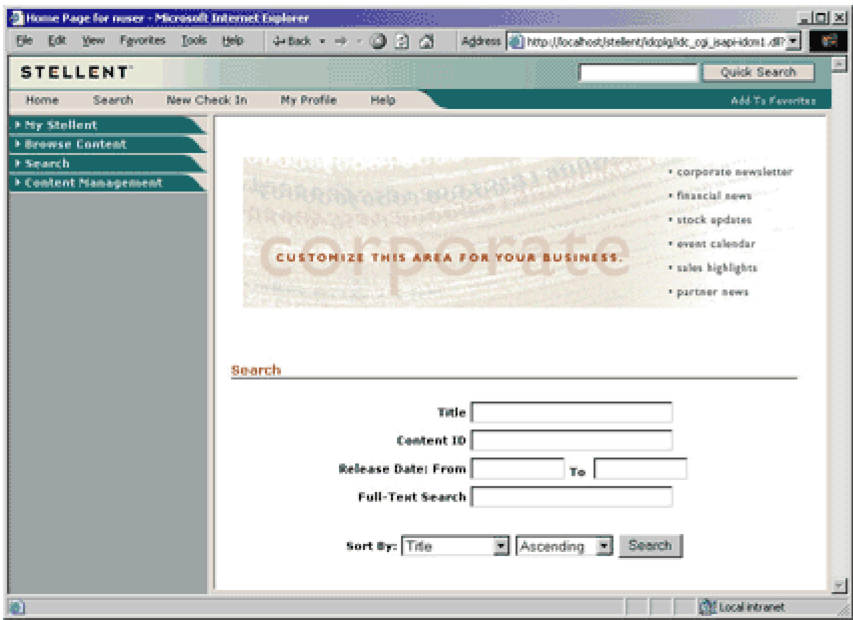
The toolbar is displayed at the top of all Stellent Content Server web pages. It contains some of the same navigation links as the portal navigation bar (page 4-13), and also provides access to the online help system.

Link	Description
Home	Displays the Home page (page 4-16).
Search	Displays the Search tray (page 5-6). From this page, you can perform metadata and full-text searches to find specific files.
New Check In	Displays the content check-in form (page 7-3), which is used to check new files into the content server.
My Profile	Displays your user profile (page 4-18).
Help	Displays the online help system.

Home Page

The home page typically includes the tray navigation, the top toolbar, and other page content and functions as determined by your system administrator. If you set up a default saved query, the results are displayed on this page (you may have to scroll down to view them).

The home page is displayed when you first log in, and you can return to the home page anytime by clicking the Home link in the toolbar (page 4-15).



Content Management Tray

The Content Management tray enables contributors to manage content in Stellent Content Server. To open this tray, click **Content Management** in the portal navigation bar (page 4-13).

Link	Description
New Check In	Displays the content check-in form (page 7-3), which is used to check new files into the content server.
Checked Out Content	Displays the Check Out Content page (page 8-2), which is used to view a list of all files currently checked out of the content server.
My Checked-Out Content	Displays the Checked Out Content for [User] page (page 8-3), which is used to view a list of all files checked out by the current user.
Work In Progress	Displays the Work In Progress page (page 6-5), which lists files that have been checked in, but not released.
Active Workflows	Displays the Active Workflows page (page 9-13), which is used to view the workflows that are currently active.
Expired Content	Displays the Expired Content page, which lists files that have expired and will be expiring soon.
Registered Publisher Projects	Displays the Registered Publisher Projects page, which is used to register Stellent Content Publisher projects. (The Stellent Content Publisher product is required to use this feature.)

PERSONALIZING THE INTERFACE

This section covers the following topics:

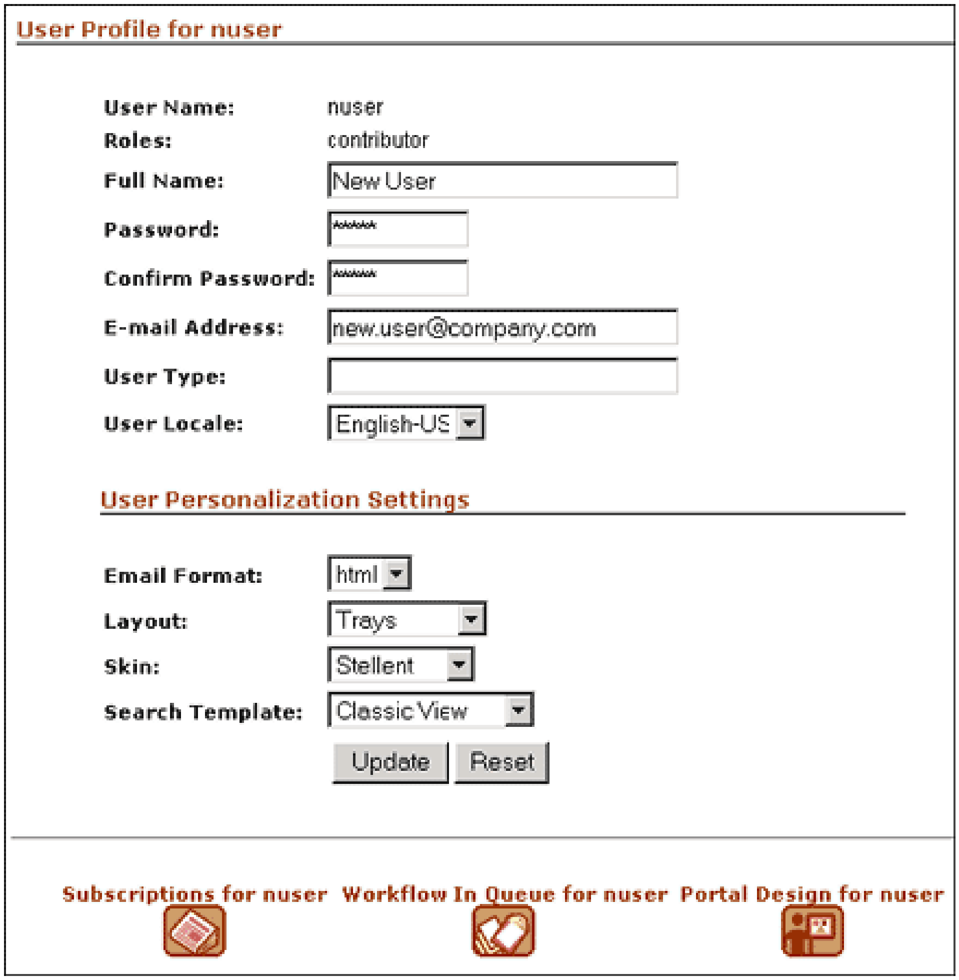
About Personalization

When you log in to Stellent Content Server, the system retrieves information about you that is stored in your *user profile*. While most of the information in your user profile (such as your user name and security permissions) can be changed only by the system administrator, there are two types of user information that you can change yourself:

- You can change personal information, such as your full name, password, and e-mail address on the user profile (page 4-18).
- You can use the My Stellent tray (page 4-22) to add links to your portal navigation bar. This provides quick access to functions you use often, such as predefined searches and links to your favorite websites.

User Profile

Your user profile enables you to change information about yourself and provides access to other user functions. To access the user profile page, click the **My Profile** link under the My Stellent tray in the portal navigation bar (page 4-13), or on the toolbar.



Feature	Description
User Name field	The user currently logged in. This field cannot be modified.
Roles field	The roles assigned to your user login. Roles determine what access you have to content and system functions. This field cannot be modified.
Accounts field	If your system administrator has enabled accounts, this field lists the accounts you have access to.
Full Name field	The full name is used by the system administrator to identify users easily.

Feature	Description
Password field	Your login password. Five asterisks are displayed in this field regardless of how many characters are in your password.
Confirm Password field	If you change your password, you must re-enter it in this field. Five asterisks are displayed in this field regardless of how many characters are in your password.
E-mail Address field	The e-mail address that is used for subscription notifications and workflow notifications.
User Type field	An identifier that can be used by the system administrator to place users in groups. **This field should not be changed.**
User Locale field	Sets the language and date/time format displayed on content server pages. If the system administrator has enabled more than one locale option, you can select the locale that you prefer.
User Personalization Settings	
Email Format field	**html**—You will receive subscription and workflow notification e-mails in HTML format. **text**—You will receive subscription and workflow notification e-mails in plain-text format.
Note: The following check boxes will be displayed and editable only if the system administrator has enabled them in the system settings. **Important:** See Working with Your Web Browser (page 4-1) for a list of supported browsers and information on browser limitations related to running applets.	
“Enable download applet” check box	**Selected**—The download applet is enabled, so you can check out multiple files. For more information, see Checking Out Multiple Files (page 8-5). **Clear**—The download applet is disabled.

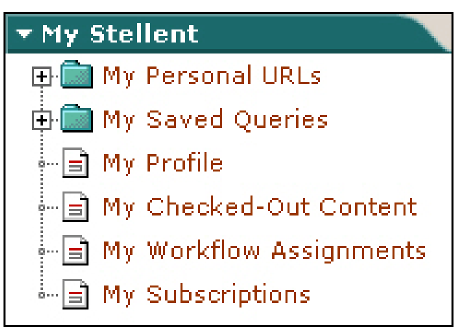
Feature	Description
"Enable upload applet" check box	**Selected—**The upload applet is enabled, so you can check in multiple files. For more information, see Checking In Multiple Files (page 7-11). **Clear**—The upload applet is disabled.
Layout	Sets the user interface of Stellent Content Server. **Trays**—This is the default layout when Stellent Content Server is installed. Features include expanding trays in the portal navigation bar (page 4-13), including a Search tray and Result tab. **Top Menus**—Trays are removed from the portal navigation bar (page 4-13) and replaced by drop-down menus located above the content area. **Classic**—Trays are removed from the portal navigation bar (page 4-13) and drop-down menus are removed from above the content area. Functions are accessed using a combination of links in the portal navigation bar (page 4-13) and the toolbar (page 4-15).
Note: The Trays layout is a frame-based layout. If your browser does not support frames, then the layout will default to Classic.	
Skin	Skins provide predefined color and icon choices for each layout.
Search Template	Sets the format of a search result. **Headline**—A single line list of search results with no thumbnail image. **Thumbnail**—A thumbnail image is displayed. **Classic**—A thumbnail image and descriptive text is displayed.
Note: The search result view can be changed dynamically using the **View** drop-down menu on a search results page.	

Feature	Description
Buttons	
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.
Links	
Subscriptions for *[User]* link	Displays the Subscriptions page (page 6-18).
Workflow in Queue for *[User]* link	Displays the Workflow in Queue page (page 9-14).
Portal Design for *[User]* link	Displays the Portal Design page (page 4-24).

My Stellent Tray

The My Stellent tray places links to various system functions specific to you in your portal navigation bar.

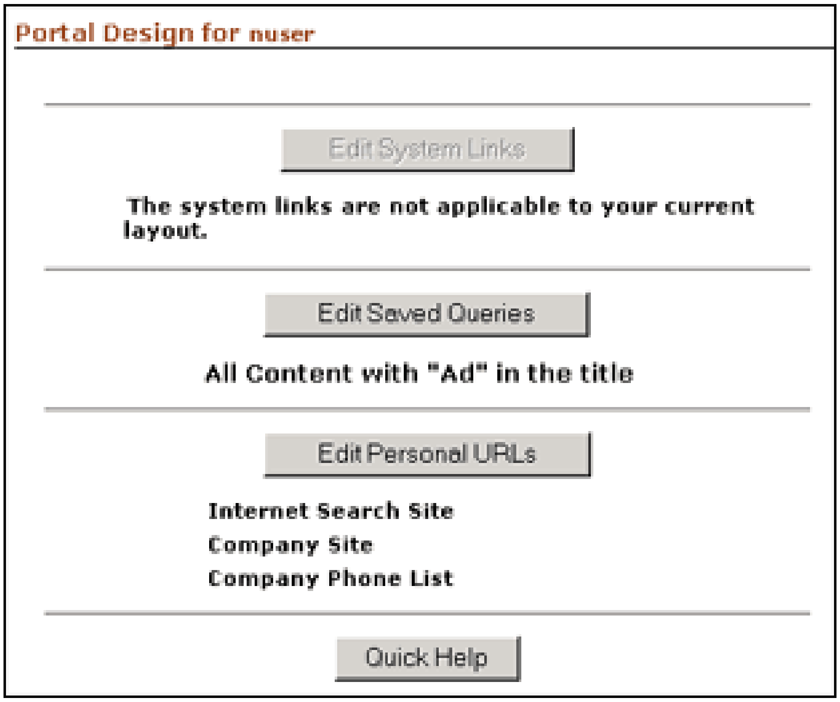
To access the links in this tray, expand the tray by clicking **My Stellent** on the portal navigation bar (page 4-13).



Feature	Description
My Personal URLs icon	Expands the folder to display links to any URLs you have saved using the Personal URLs page (page 4-26). Saved URLs can include web addresses to internal content or external sites.
My Personal URLs link	Displays the Personal URLs page (page 4-26).
My Saved Queries icon	Expands the folder to display links to any searches you have saved using the Save Search action on a search results page.
My Saved Queries link	Displays the Saved Queries page (page 4-25), where you can remove searches from your My Saved Queries folder.
My Profile	Displays the user profile (page 4-18).
My Checked-Out Content	Displays a list of all content currently checked out by you.
My Workflow Assignments	Displays a list of all content items currently in a workflow for which you have responsibility.
My Subscriptions	Displays a list of all content items to which you are subscribed.

Portal Design Page

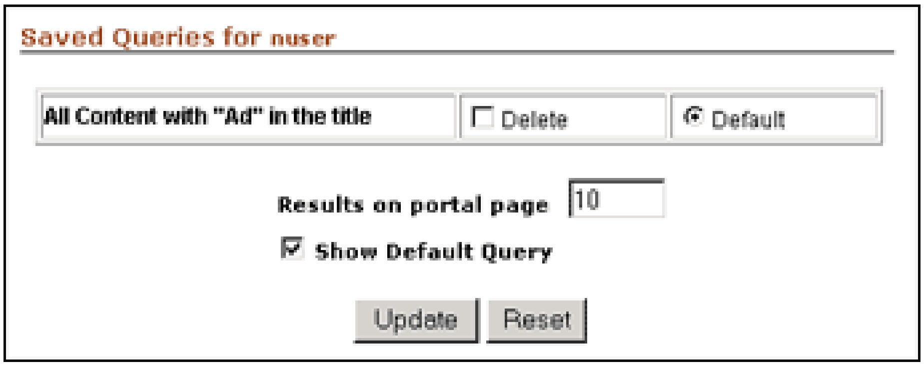
The Portal Design page is used to personalize your portal navigation bar. To access this page, click the **Portal Design** link on the user profile (page 4-18).



Feature	Description
Edit System Links button	This link is unavailable if you are using a layout style other than Classic. If you are using the Classic layout, this link displays the System Links page, which enables you to place links to various system functions in your portal navigation.
Edit Saved Queries button	Displays the Saved Queries page (page 4-25), which enables you to modify and delete the saved queries that are displayed in the My Stellent tray (page 4-22).
Edit Personal URLs button	Displays the Personal URLs page (page 4-26), which enables you to display URL links under the My Stellent tray (page 4-22), similar to bookmarks in a browser.

Saved Queries Page

The Saved Queries page is used to modify and delete the saved queries that are displayed in your portal navigation bar. To access this page, click **My Saved Queries** under the **My Stellent** tray in the portal navigation bar (page 4-13), or **Edit Saved Queries** on the Portal Design page (page 4-24).



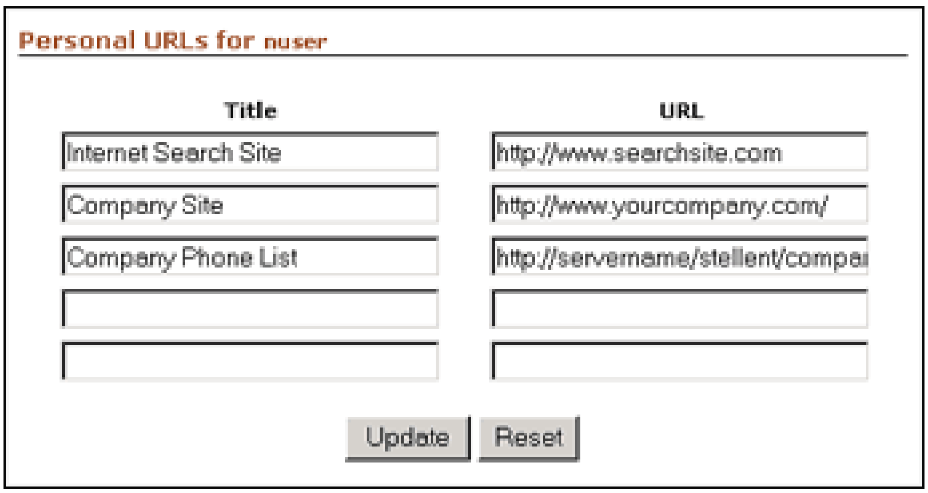
Note: See Saving a Query (page 5-36) for information on how to save a query link in your portal navigation bar.

Feature	Description
Queries	Lists the queries you have saved.
Delete check box	The selected query links will be deleted when you click the Update button.
Default option	Selects the query link that will be displayed in a different color in the portal navigation bar if the Show Default Query check box is selected.
Results on Portal Page field	Indicates the number of content items for the default query that will be displayed on the portal page (home page) if the Show Default Query check box is selected.
Show Default Query check box	Select this check box to display the results of the selected default query on the portal page (home page). The default query link will be displayed in a different color in your portal navigation bar.
Update button	Saves any changes that were made on this page.

Feature	Description
Reset button	Resets the fields on this page to the previously saved settings.

Personal URLs Page

The Personal URLs page is used to save links to websites in your portal navigation bar. To access this page, click **My Personal URLs** under the **My Stellent** tray in the portal navigation bar (page 4-13), or **Edit Personal URLs** on the Portal Design page (page 4-24).



Feature	Description
Title field	The link that will appear in your portal navigation bar.
URL field	The complete Uniform Resource Locator (URL) of the website. For example: *http://www.stellent.com*.
Update button	Saves any changes that were made on this page.
Reset button	Resets the fields on this page to the previously saved settings.

Editing Your User Profile

Use the following procedure to edit your user profile information:

1. Click **My Profile** in the toolbar (page 4-15), or under the **My Stellent** tray in the portal navigation bar (page 4-13).

   The user profile (page 4-18) is displayed.

2. Edit your full name, password, and e-mail address as necessary. Please note the following considerations:

   - If you are changing your password, you must enter the new password in both the **Password** and **Confirm Password** fields.
   - Do not change your user type or user locale; these fields should be changed only by a system administrator.

3. Select an option for e-mail notification format, either HTML or text.

4. Enable or disable the upload and download applets.

Note: The check boxes for the upload and download applets will be displayed only if the system administrator enabled them.

5. Select a layout, skin, and search template.

6. Click **Update**.

Adding Links to Favorites

You can add a link to the Favorites menu of your browser so that you can quickly access any content or content server page. Use the following procedure to add a link to your Favorites menu:

1. Browse to the page you want to add to your Favorites. The page could be a search result, a content information page, a content item, or any other page accessed by the content server.

2. Click the **Add to Favorites** link in the upper right of the toolbar (page 4-15).

   The Add Favorite dialog box is displayed.

3. Select the folder in which you want the Favorite and click **OK**.

Editing Saved Queries

Use the following procedure to edit links to saved queries in your My Saved Queries tray:

Note: See Saving a Query (page 5-36) for information on how to save a query link in your portal navigation bar.

1. Click the **My Saved Queries** link under the **My Stellent** tray.

   The Saved Queries page (page 4-25) is displayed.

2. To delete a saved query, select the **Delete** check box.

3. To display the results of a query on the home page, select the **Default** option for that query and select the **Show Default Query** check box.

4. To set the number of content items displayed on the home page for the selected default query, enter a number in the **Results on portal page** field, and make sure that the **Show Default Query** check box is selected.

5. Click **Update**.

Saving Personal URLs

Use the following procedure to save links to websites in your portal navigation bar:

1. Click the **My Personal URLs** link under the **My Stellent** tray in the portal navigation bar.

   The Personal URLs page (page 4-26) is displayed.

2. Type a descriptive name in the **Title** field. This name will appear as the link in your portal navigation bar.

3. Enter a complete web address in the **URL** field, for example: *http://www.stellent.com*.

4. Click **Update**.

Chapter

5

FINDING FILES

OVERVIEW

There are several ways to find files in Stellent Content Server:

- ❖ Browsing to content (page 5-2)—This enables you to find a file by navigating through a hierarchical link structure that has been set up by your system administrator.
- ❖ Searching by metadata (page 5-11)—This enables you to find a file based on information about the file.
- ❖ Searching for specific text (page 5-16)—This enables you to find a file based on the actual text in the file.

You can also search for a file using a combination of metadata and specific text search criteria.

Note: If your system administrator has configured the content server to search database metadata only, then you will not be able to search for specific text.

See Also

– *Search Pages (page 5-3)*

– *Working with Search Results (page 5-28)*

– *Saving Queries (page 5-35)*

Browsing to Content

This section covers the following topics:

Browse Content Tray

Browsing content in Stellent Content Server is similar to looking for a paper document in your organization's file cabinets. In a file cabinet, you find the file drawer, then the folder, then the document. In Stellent Content Server, you find documents and links to websites in folders in the Browse Content tray.

Library Folders

The Browse Content tray is set up in a hierarchical link structure (the "Library"), where each folder level is based on metadata. The Library Folder is set up by default. Your system administrator determines the hierarchy of any folders within the Library Folder. Clicking the plus sign (+) next to a collapsed folder will expand the contents of the folder. Clicking the minus sign (–) next to an expanded folder will collapse it. Clicking a link in the last folder of a hierarchy will take you to one of the following:

- A list of content items that match the folder's metadata and that you have permission to view
- A website
- A report that provides information about content items, users, metadata fields, or other content server elements.

See Also

– *Browsing Content to Find a File (page 5-3)*

Browsing Content to Find a File

Use the following procedure to find information by browsing content:

1. Click the Browse Content tray in the portal navigation bar to expand the tray.
2. Scan the list of folders until you find the one you are looking for.
3. Click the plus sign (+) next to the folder to expand the folder contents and continue drilling down through the folders until you reach a link to one of the following:
    - a search results page (page 5-28),
    - a different website
    - a content server report

SEARCH PAGES

You can perform a content item search from the following places in the Stellent Content Server interface:

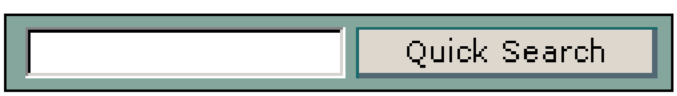
❖ Quick Search Field (page 5-3)

❖ Home Page Search Fields (page 5-4)

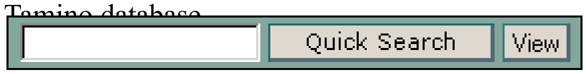
❖ Search Tray (page 5-6)

Quick Search Field

The quick search field enables you to perform a full-text search regardless of what page is displayed in the content area. If you have changed your layout to the Classic layout, the Quick Search field must be enabled by selecting the Quick Search check box on your System Links page.



Note: If your system administrator has configured the content server to search database metadata only, the Quick Search option will not be displayed.

Feature	Description
Text entry field	Enter full-text search terms in this field.
Quick Search button	Displays a search results page that lists the content items that contain the search terms.
View button	If your content server is set up with the Tamino search/ index engine, the View button is displayed next to the Go button. Entering an XML element name in the quick search field and clicking the View button returns the first occurrence of the element found in the documents in the Tamino database. 

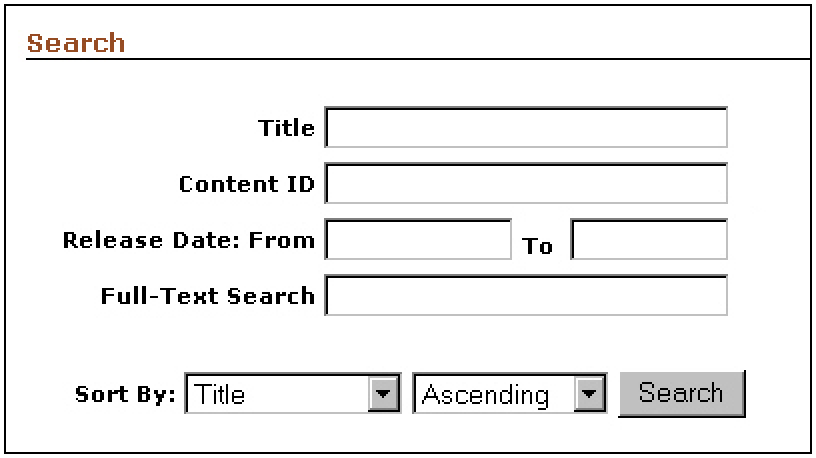
See Also

– *Searching for Specific Text (page 5-16)*

Home Page Search Fields

The home page search fields enable you to perform a metadata search, full-text search, or a combination of both from the content server home page (page 4-16). Only the most commonly used search fields are available from the home page.

Note: Your home page may have a different appearance than the default “out-of-the-box” content server home page, which includes search fields. If search functionality is not available from your home page or if you want to search on additional metadata fields, use the search tray (page 5-6) or Advanced Search page (page 5-9).



Feature	Description
Title field	A descriptive name for the content item.
Content ID field	The unique identifier for the content item.
Release Date fields	The date that the item was released to the content server. **From**—The search finds items released on or after this date. **To**—The search finds items released before (but not on) this date.
Full-Text Search field	Enter full-text search terms. For details refer to Searching for Specific Text (page 5-16).

Note: If your system administrator has configured the content server to search database metadata only, the Full-Text Search field will not be displayed.

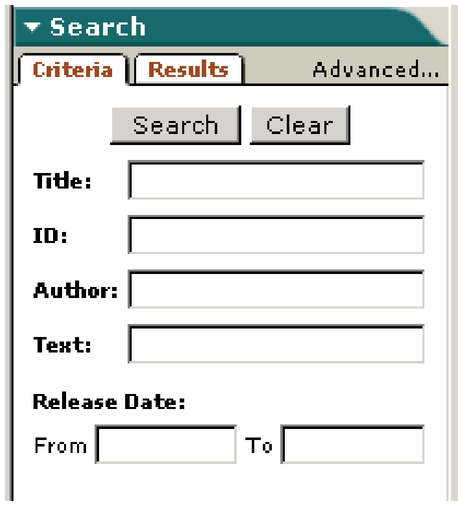
Feature	Description
Sort By list	Specifies the field that the search results will be sorted on: **Release Date (default)**—Sorts by the Release Date metadata field. **Title**—Sorts alphabetically by the Title metadata field. **Score**—Sorts by the number of occurrences of search terms, or the proximity of search terms when a proximity operator such as <NEAR> is used. Applies only to full-text search.
Order list	Specifies the sort order of the search results: **Descending (default)**—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order. **Ascending**—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order.
Search button	Displays a list of the content items that match the search criteria on a search results page (page 5-28).

Search Tray

The Search tray enables you to perform a metadata, full-text, or combination search from the content server's portal navigation bar (page 4-13). Clicking the Search tray will expand or collapse the tray. Only the most commonly used search fields are available from the Search tray.

Criteria Tab

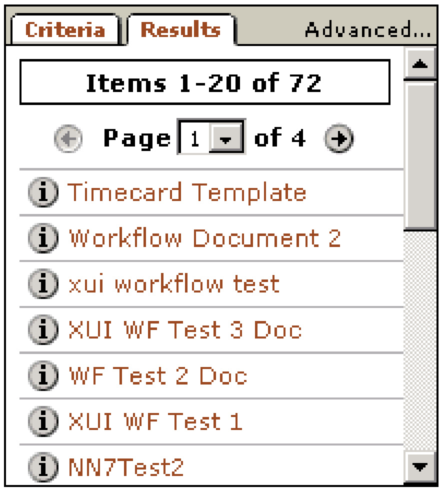
The Criteria tab displays the form in which you enter your search criteria.



Feature	Description
Advanced	Displays the Advanced Search page (page 5-9).
Search button	Submits the search criteria entered to the content server.
Clear button	Clears any criteria entered into the search fields.
Title field	A descriptive name for the content item.
ID field	The unique identifier for the content item.
Text field	Enter full-text search terms. For details refer to Searching for Specific Text (page 5-16).
Note: If your system administrator has configured the content server to search database metadata only, the Text field will not be displayed.	
Release Date fields	The date that the item was released to the content server. **From**—The search finds items released on or after this date. **To**—The search finds items released before (but not on) this date.

Results Tab

The Results tab is the area where a listing of search results based on the criteria entered in the criteria tab is displayed. The search results remain in the results tab until a new search is performed or the page is refreshed.

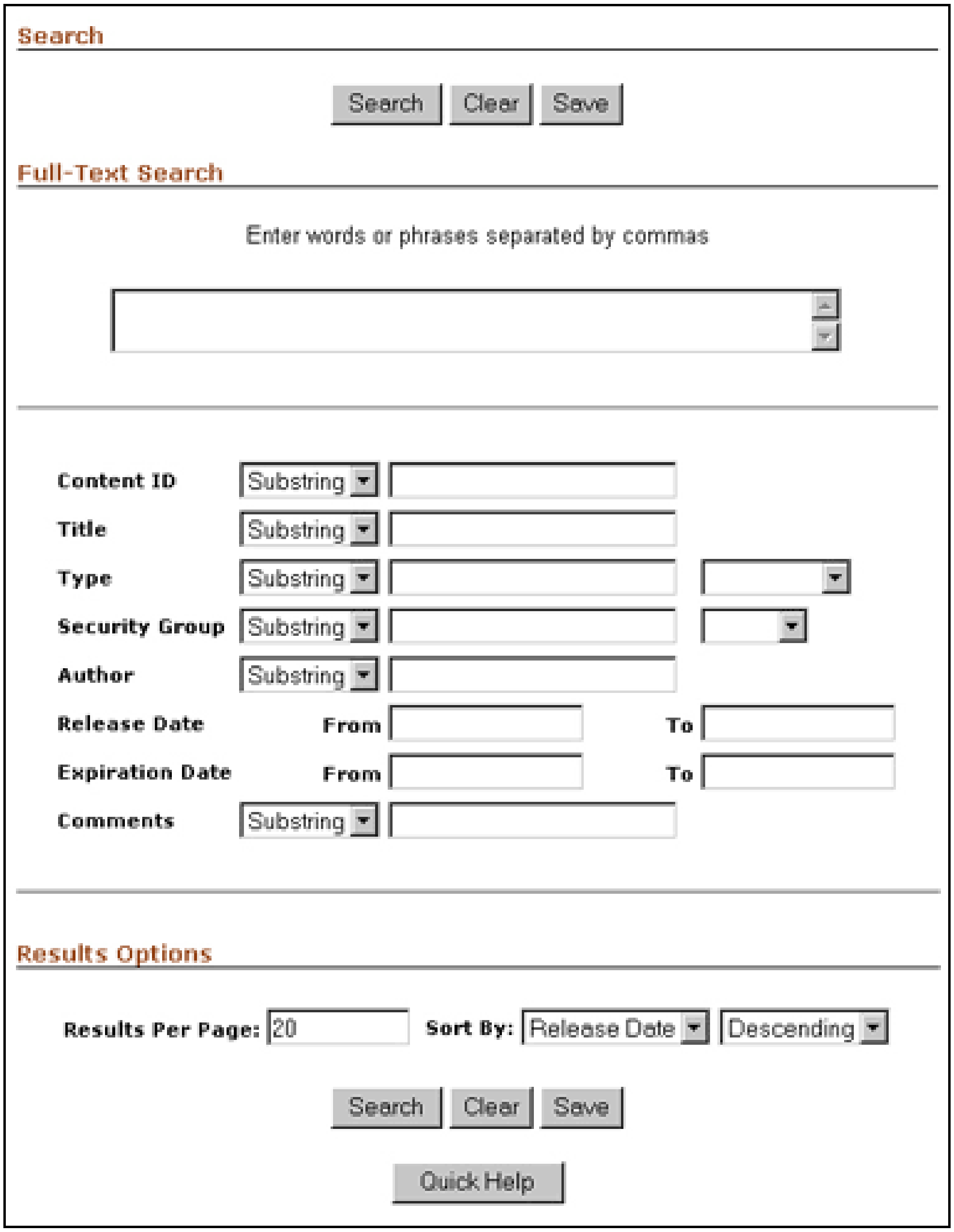


Feature	Description
Advanced	Displays the Advanced Search page (page 5-9).
“Page *x* of *y*” choice list	Selects which search results page in a series to view.
Note: If your system administrator has configured the content server to use the database for indexing and searching, **Page *x* of *y*** will be replaced by **Next** and **Previous** links. Clicking **Next** will advance the search results tab to the next page of results. Clicking **Previous** will return you to the previous results page.	
Arrow buttons	**Forward**—Advances to the next search results page in a series. **Back—**Returns to the previous search results page in a series.
Info icon	Displays the content information of the corresponding content item.
ID field	The unique identifier for the content item.

Feature	Description
Text field	Enter full-text search terms. For details refer to Searching for Specific Text (page 5-16).
Release Date fields	The date the item was released to the content server. **From**—The search finds items released on or after this date. **To**—The search finds items released before (but not on) this date.

Advanced Search Page

The advanced search page enables you to perform a metadata search, full-text search, or a combination of both on all available fields. To access this page, click the **Advanced** link under the Search tray (page 5-6) or the **Search** link on the toolbar (page 4-15).



Feature	Description
Search button	Displays a list of the content items that match the search criteria on a search results page (page 5-28). If no search criteria are specified, a list of all content items is displayed.

Feature	Description
Clear button	Clears the search fields, but does not reset the results options settings.
Save button	Saves the search as a saved query link in the portal navigation bar (page 4-13). You are prompted to enter a title for the link.
Full-Text Search field	Enables you to search for words within content items. For details refer to Searching for Specific Text (page 5-16).
Note: If your system administrator has configured the content server to search database metadata only, the Full-Text Search field will not be displayed.	
Metadata fields	Enables you to search by content item metadata. For details refer to Metadata Search Fields (page 5-12).
Results Options	Enables you to specify how search results are displayed. For details refer to Working with Search Results (page 5-28).
Quick Help button	Displays the help topic specific to the advanced search page.

SEARCHING BY METADATA

This section covers the following topics:

About Metadata Searching

Metadata searching is similar to finding a book in a library by searching for its author, title, or subject. When you search by metadata, you specify as much information as you know about a file or a group of files. For example, if you want to find all files written by your supervisor for your department that were released on or after 1/1/2002, you would specify the following on the search page:

- Author: *supervisor's user name*
- Department: *department name*
- Release Date From: *1/1/2002*

Note: When searching for metadata, case sensitivity and wild card options will vary depending on how your system administrator has configured the content server. See you system administrator for your specific configuration.

Metadata Search Fields

The Search tray (page 5-6) and advanced search page (page 5-9) enable you to search on the standard metadata fields listed in the table below. If custom metadata fields have been created for your content server system, they typically will be displayed below the standard metadata fields.

Field	Description
Content ID	The unique identifier for the content item.
Title	A descriptive name for the content item.
Type	The category of the document. You can enter text or select from the list of predefined values.
Security Group	An identifier that specifies access permission to the content item. You can enter text or select from the list of predefined values.
Account	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.

Field	Description
Author	The user who checked in the current content item revision.
Release Date	The date that the current revision was released to the content server. **From**—The search finds content items released on or after this date. **To**—The search finds content items released before (but not on) this date.
Expiration Date	The date that the content item will no longer be available for searching or viewing in the content server. **From**—The search finds content items that will expire on or after this date. **To**—The search finds content items that will expire before (but not on) this date.
Comments	Additional notes about the content item.

Metadata Search Case Sensitivity

Case sensitivity for metadata searches varies depending on how your system administrator has configured the content server.

Note: See your system administrator for your specific configuration.

Verity and Tamino

If the content server is using the Verity or Tamino search engine, metadata searches use the following rules for case sensitivity:

❖ When you use all lowercase or all uppercase letters in search expressions, metadata searches are not case-sensitive.

  For example, a search for the word *SERVER* and *server* will find *SERVER*, *server*, *Server*, and *SerVer*.

❖ When you use mixed-case search expressions, metadata searches are case-sensitive.

  For example, a search for the word *Server* will find *Server*, but not *SERVER* or *server*.

❖ When you use the “Matches” search operator, the metadata searches are case-sensitive. For details refer Metadata Search Operators (page 5-15).

Tech Tip: Generally, you should use all lowercase search strings to ensure that you find all of the files that match your search expression. Use mixed-case search strings **only** if you are looking for a specific combination of lower case and upper case.

SQL Server

If the content server is using database searching with SQL Server, metadata searches are never case-sensitive.

Oracle

If the content server is using database searching with Oracle, metadata searches are always case-sensitive. This is in contrast to full-text searches, which are case-insensitive when Oracle database searching is used.

Metadata Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. Wildcards are usable only if the content server is configured to use the Verity or Tamino search engine. If your system administrator has configured the content server to use the database for indexing and searching, wildcards cannot be used.

If the content server is configured to use the Verity or Tamiono search engine, the following wildcards can be used in metadata search fields:

❖ An **asterisk (*)** stands for zero or more alphanumeric characters. For example:
  - *form** matches *form* and *formula*
  - **form* matches *form* and *reform*
  - **form** matches *form*, *formula*, *reform*, and *performance*

❖ A **question mark (?)** stands for one alphanumeric character. For example:
  - *form?* matches *forms* and *form1*, but not *form* or *formal*
  - *??form* matches *reform* but not *perform*

Metadata Search Operators

On the advanced search page (page 5-9), search operators can be used to refine the search criteria for a number of metadata fields. These operators are listed as options in drop-down lists to the left of each field.

Operator	Description	Example
Substring	Finds content items with the specified string anywhere in the metadata field. This has the same effect as placing an asterisk wildcard before and after the search term. This is the most commonly used operator and is the default operator.	When *form* is typed in the Title field, the search returns items with words such as *forms*, *performance*, and *reform* in their title.
Contains	Finds items with the specified whole word or phrase in the metadata field. No wildcard is placed before or after the specified value.	When *form* is typed in the Title field, the search returns items with the word *form* in their title, but does not return items with the words *performance* or *reform*.
Note: Metadata wildcards (page 5-14) can be used with the *Contains* operator. For example, typing *form??* in the Title field and selecting *Contains* finds items with the words *formed*, *former*, and *formal* in their title.		
Note: The *Contains* operator is used with only the Verity and Tamino search engines. It is not available if your system administrator has configured the content server to use the database for indexing and searching.		
Matches	Finds items with the exact specified value in the metadata field.	When *address change form* is typed in the Title field, the search returns items with the exact title of *Address Change Form*.
Starts	Finds items with the specified value at the beginning of the metadata field. This has the same effect as placing an asterisk wildcard after the search term.	When *form* is typed in the Title field, the search returns all items with titles that begin with the word *form*, including *forms*, *forming*, etc.

Operator	Description	Example
Ends	Finds items with the specified value at the end of the metadata field. This has the same effect as placing an asterisk wildcard before the search term.	When *form* is typed in the Title field, the search returns all items with titles that end with the word *form*, such as *form*, *perform*, *chloroform*, etc.

Searching by Metadata

Use the following procedure to search for files using metadata as the search criteria:

1. Display the home page search fields (page 5-4) or the Search tray (page 5-6).
2. Enter your search criteria in the metadata search fields (page 5-12).
    - Select the appropriate metadata search operators (page 5-15).
    - Use metadata wildcards (page 5-14) as necessary.
    - Keep metadata search case sensitivity (page 5-13) in mind.
3. Select the results options (page 5-33) for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the search results page (page 5-28).

Searching for Specific Text

This section covers the following topics:

About Full-Text Searching

Full-text searching enables you to find a content item based on the text contained in the file itself. When a content item is checked into the content server, the indexer stores all of the words in the web-viewable version of the content item (PDF, HTML, text, or other supported file formats) in an index. When you perform a full-text search, the search expression is compared with the index, and any content items and discussions that contain your search text are returned in the search results.

A full-text search expression can include the following elements:

- **Strings—**partial words (such as *addr*)
- **Words—**individual whole words (such as *addresses*)
- **Phrases—**multiple-word phrases (such as *new addresses*)
- **Operators—**logic applied to words and phrases (such as *news AND addresses*)

See Full-Text Search Rules (page 5-18) for more information.

See Also

– *Full-Text Search Options (page 5-17)*
– *Performing a Full-Text Search (page 5-27)*

Full-Text Search Options

Stellent Content Server offers a choice of three full-text search options: the Verity search engine, the Tamino search engine, or database full-text searching. Database full-text search uses capabilities built into the database being used by the content server, and differ depending on the database. The database being used could be either SQL Server or Oracle. The search option running on your system will determine the full-text search capabilities.

Search Option	Description
Verity search engine	Indexes the following file formats: pdf, html, htm, msword, doc, rtf, ms-excel, xls, ppt, ms-powerpoint, postscript, text, txt, and xml. For details refer to Verity Full-Text Search Options (page 5-20).
Tamino search engine	Indexes native and converted XML documents. For details refer to Tamino Full-Text Search Options (page 5-22).

Search Option	Description
Database full-text searching	**SQL Server**— Indexes the following file formats: html, htm, msword, doc, rtf, ms-excel, xls, ppt, ms-powerpoint, text, txt, and xml. For details refer to SQL Server Database Full-Text Search Options (page 5-24). **Oracle**— Indexes the following file formats: html, htm, msword, doc, rtf, ms-excel, xls, ppt, ms-powerpoint, text, txt, and xml. For details refer to Oracle Database Full-Text Search Options (page 5-26).

Note: If your content server uses the Tamino search engine or database full-text searching, you have fewer options of wildcards and full-text search operators.

Full-Text Search Rules

The following search rules will help you refine your full-text search criteria:

❖ Full-text searches using the Verity or Tamino search engine are case-sensitive. Database full-text searches are not case-sensitive. For details refer to Full-Text Search Case Sensitivity (page 5-19).

❖ You can use wildcards in full-text search queries, but the various full-text search engines use different wildcards:

- Verity Full-Text Wildcards (page 5-20)
- Tamino Full-Text Wildcards (page 5-23)
- SQL Server Database Full-Text Wildcards (page 5-24)
- Oracle Database Full-Text Wildcards (page 5-26).

❖ You can use search operators in full-text search queries, but the various full-text search engines use different operators:

- Verity Full-Text Search Operators (page 5-20)
- Tamino Full-Text Search Operators (page 5-23)
- SQL Server Database Full-Text Search Operators (page 5-25)
- Oracle Database Full-Text Search Operators (page 5-26).

❖ Use spaces to separate words in a phrase.

- ❖ When you perform a full-text search, the search finds the word you specify **and** words that have the same "stem". For example, searching for the word *address* finds files with the word *address*, *addressing*, *addresses*, and *addressed* in them. If you want to limit the search to the word you specify, place the word in double quotes (for example, *"address"*).
- ❖ You can sort full-text search results by the number of occurrences of the search terms and the proximity of the search terms when an operator such as <NEAR> is used. Select the **Score** option from the **Sort By** list on the search results page (page 5-28).

Full-Text Search Case Sensitivity

Case sensitivity for full-text searches varies depending on how your system administrator has configured the content server.

Note: See your system administrator for your specific configuration.

Verity and Tamino

Full-text searches with the Verity or Tamino search engines use the following rules for case sensitivity:

- ❖ When you use all lowercase or all uppercase letters in search expressions, full-text searches are not case-sensitive.

  For example, a search for the word *SERVER* and *server* will find *SERVER*, *server*, *Server*, and *SerVer*.
- ❖ When you use mixed-case search expressions, full-text search are case-sensitive.

  For example, a search for the word *Server* will find *Server*, but not *SERVER* or *server*.
- ❖ If your system uses the Verity full-text indexing engine, you can use the *<CASE>* full-text search operator to restrict a full-text search expression to lower case or upper case. For details refer to Verity Full-Text Search Operators (page 5-20).

Tech Tip: Generally, you should use all lowercase search strings to ensure that you find all of the files that match your search expression. Use mixed-case search strings **only** if you are looking for a specific combination of lower case and upper case.

SQL Server and Oracle

If the content server is using database searching with SQL Server or Oracle, full-text searches are never case-sensitive.

Verity Full-Text Search Options

This section covers the following topics:

❖ Verity Full-Text Wildcards (page 5-20)

❖ Verity Full-Text Search Operators (page 5-20)

Verity Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcards can be used in Verity full-text search fields:

❖ An **asterisk (*)** stands for zero or more alphanumeric characters. For example:

- *form** matches *form*, *formal*, and *formula*
- **form* matches *form* and *reform*
- **form** matches *form*, *formula*, *reform*, and *performance*

❖ A **question mark (?)** stands for one alphanumeric character. For example:

- *form?* matches *forms* and *form1*, but not *form* or *formal*
- *??form* matches *reform* but not *perform*

Verity Full-Text Search Operators

The following operators can be used to refine your Verity full-text search expression.

Important: AND, OR, and NOT are treated as operators by default and do not require angle brackets (< >). If you want to use these terms as search terms, place them in double quotes (for example, “and”). You must place all other operators in angle brackets.

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	Description	Example
AND	Finds content items that contain all of the specified terms.	*address AND name* returns content items that contain both specified words.
OR	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
, (comma)	Finds content items that contain at least one of the specified terms.	*safety, security, protection* returns content items that contain at least one of the three words.
NOT	Finds content items that contain the term that precedes the operator (if any), and ignores content items that contain the term that follows it.	*NOT server* returns content items that do not contain the word *server*. *internet NOT server* returns content items that contain the word *internet* and do not contain the word *server*.
" (double quotation mark)	Finds content items that contain only the specified term, not any variations of the stem of the word.	*"address"* returns content items that contain *form* as a whole word, but does not return content items that contain *addresses*, *addressing*, or *addressed*.
` (back quoteation mark)	Allows for proper parsing of date format when used within a scripted full-text search.	*dInDate >* `*<$dateCurrent(-7)$>*` returns all content checked in and released within the last seven days. Without the back quotes, the current date format may not properly span multiple years.
<NEAR>	Finds content items that contain the specified terms in close proximity to each other. Terms that are closer together receive a higher score.	*internet <NEAR> server* returns content items that contain the specified words close to one another.

Operator	Description	Example
<SENTENCE>	Finds content items that contain the specified terms within the same sentence.	*internet <SENTENCE> server* returns content items that contain *internet* and *server* in the same sentence.
<PARAGRAPH>	Finds content items that contain the specified terms within the same paragraph.	*internet <PARAGRAPH> server* returns content items that contain *internet* and *server* in the same paragraph.
<THESAURUS>	Finds content items that contain words that are synonyms for the specified word.	*<THESAURUS> talk* returns content items that contain *talk, speak,* and *say*.
<CASE>	Finds content items that contain the specified term in the specified case.	*<CASE> ADDRESS* returns content items that contain *ADDRESS*, but does not return items that contain *addres* or *Address*.

Tamino Full-Text Search Options

This section covers the following topics:

- Indexing in Tamino (page 5-22)
- Tamino Full-Text Wildcards (page 5-23)
- Tamino Full-Text Search Operators (page 5-23)

Indexing in Tamino

Tamino indexes files that are in XML format, which means that each “chunk” of text in a file is placed inside a set of XML tags, such as `<Tag>chunk of text</Tag>`. Each set of tags and the text between them is called an *XML element*. When an XML document is full-text indexed, there is no word boundary (such as a space) just after the opening tag or just before the closing tag. Therefore, the words at the beginning and end of each XML element do not get indexed as separate words.

For example, if the title of your document is “New Symbols and Functions,” the XML might look like this:

```
<Title>New Symbols and Functions</Title>
```

When this file is indexed, only the words “symbols” and “and” will be included as separate words in the full-text index. If you enter “new” or “functions” in a full-text search field, this file will not be included in the search results. However, you can use Tamino’s full-text wildcards (page 5-23) to find all occurrences of a word. For example, searching for `*new*` or `*function*` would return the document.

Important: Tamino does not full-text index files that are in non-XML format. If a native file is not in XML format and it is not converted to XML, it will not be included in full-text search results.

Tamino Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcard can be used in Tamino full-text search fields:

❖ An **asterisk (*)** stands for zero or more alphanumeric characters. For example:
  - *form** matches *form*, *formal*, and *formula*
  - **form* matches *form* and *reform*
  - **form** matches *form*, *formula*, *reform*, and *performance*

Tamino Full-Text Search Operators

The following operators can be used to refine your Tamino full-text search expression.

Important: When using Tamino to search for text, you must place all full-text search operators in angle brackets (< >).

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	Description	Example
<AND>	Finds content items that contain all of the specified terms.	*address AND name* returns content items that contain both specified words.

Operator	Description	Example
<OR>	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
<NOT>	Finds content items that contain the term that precedes the operator (if any), and ignores content items that contain the term that follows it.	*NOT server* returns content items that do not contain the word *server.* *internet NOT server* returns content items that contain the word *internet* and do not contain the word *server.*
<NEAR>	Finds content items that contain the specified terms in close proximity to each other. Terms that are closer together receive a higher score.	*internet <NEAR> server* returns content items that contain the specified words close to one another.
<ADJ>	Finds content items that contain the specified terms next to each other.	*internet <ADJ> server* returns content items that contain the specified terms next to each other.

SQL Server Database Full-Text Search Options

This section covers the following topics:

- SQL Server Database Full-Text Wildcards (page 5-24)
- SQL Server Database Full-Text Search Operators (page 5-25)

SQL Server Database Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcard can be used in SQL Server database full-text search fields (only when used following a prefix):

- An **asterisk (*)** stands for zero or more alphanumeric characters. For example:
  - *form** matches *form*, *formal*, and *formula*

SQL Server Database Full-Text Search Operators

The following operators can be used to refine your SQL Server database full-text search expression.

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	Description	Example
AND	Finds content items that contain all of the specified terms.	*address AND name* returns content items that contain both specified words.
AND NOT	Finds content items that contain the first term, but not the second term.	*address AND NOT name* returns content items that contain the first word, but not both words.
OR	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
“phrase”	Finds content items that contain the phrase specified between the quotes.	*“address change”* returns content items that contain the exact specified phrase.
NEAR	Finds content items that contain the specified terms in close proximity to each other.	*internet NEAR server* returns content items that contain the specified words close to one another.
ISABOUT(term1, term2)[method]	Finds content items that contain the specified terms and ranks them based on the specified method.	*ISABOUT(address, name)* returns items containing both *address* and *name*, and ranks the results based on how well they meet the criteria specified in the ranking method.

Operator	Description	Example
“PREFIX*”	Finds content items that contain the term specified between the quotes as a prefix to the wildcard.	*“form*”* returns content items that contain words with *form* as a prefix, for example, *forms, formal, formula,* but not words with form as a substring, such as *inform*, *uniform*, or *reformation*.

Note: The * wildcard can be used in full-text searches only when following a prefix.

Oracle Database Full-Text Search Options

This section includes these topics:

Oracle Database Full-Text Wildcards

A wildcard substitutes for unknown or unpredictable characters in the search term. The following wildcard can be used in Oracle database full-text search fields:

- A **percent underscore (%_)** equals zero or more alphanumeric characters.

Oracle Database Full-Text Search Operators

The following operators can be used to refine your Oracle database full-text search expression.

Note: For clarity, the operators are shown in upper case, but they can be in lower case as well.

Operator	Description	Example
AND	Finds content items that contain all of the specified terms.	*address <AND> name* returns content items that contain both specified words.

Operator	Description	Example
OR	Finds content items that contain at least one of the specified terms.	*safety OR security OR protection* returns content items that contain at least one of the three words.
NOT	Finds content items that contain the term that precedes the operator (if any), and ignores content items that contain the term that follows it.	*NOT server* returns content items that do not contain the word *server*. *internet NOT server* returns content items that contain the word *internet* and do not contain the word *server*.
NEAR(term1, term2)	Finds content items that contain the specified terms in close proximity to each other. Terms that are closer together receive a higher score.	*internet <NEAR> server* returns content items that contain the specified words close to one another.
ABOUT(phrase)	Finds content items that contain the phrase specified in the parenthesis.	*ABOUT(changed address)* returns content items that contain specified phrase.

Performing a Full-Text Search

Use the following procedure to perform a full-text search:

1. Display the Quick Search field (page 5-3), home page search fields (page 5-4), Search tray (page 5-6), or advanced search page (page 5-9).
2. Enter your search terms in the full-text search field.
   - Take the full-text search rules (page 5-18) into account.
   - Keep full-text search case sensitivity (page 5-19) in mind.
   - Use the Verity full-text search options (page 5-20) or Tamino full-text search options (page 5-22) as necessary.
3. Select the results options (page 5-33) for displaying the results.
4. Click **Search**.

The files that match your search criteria are displayed on the search results page (page 5-28) or in the Results tab (page 5-8) under the Search tray in the Portal Navigation Bar.

Working with Search Results

This section covers the following topics:

About Search Results

You can specify how to display the results of your search based on the number of content items that you want returned per page and the order in which you want the content items listed. For example, if you are searching for specific text such as *changed address*, then you might want to sort your search results by score. If you want to find the most recent files that match your criteria, you can sort the results by release date.

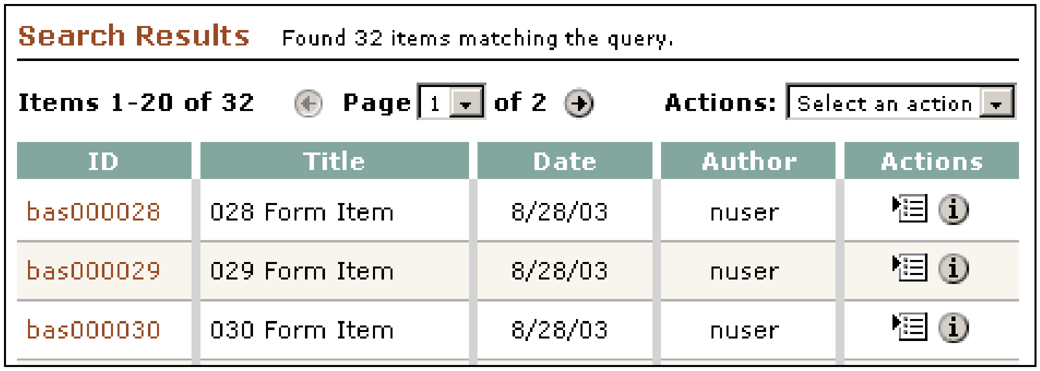
Search Results Page

The search results page displays a list of content items that match the criteria specified during a search. You can control how your search results page looks by choosing a default search template on your user profile (page 4-18). You can also change the template by selecting a different view option from the Action choice list on the search results page. The search results page is slightly different depending on which search engine your system uses:

- Verity Search Results Page (page 5-29)
- Tamino Search Results Page (page 5-32)

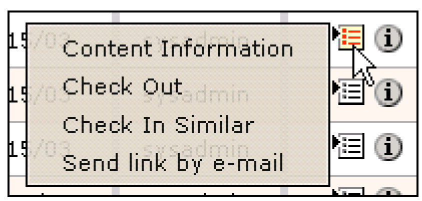
Verity Search Results Page

This section describes the search results page for the Verity search engine.



Feature	Description
Found *x* items matching the query	Shows the number of content items that match the search criteria.
Items *x-y* of *z*	Shows the number of content items being displayed on the current search results page. This is displayed only when more than one page of content items is returned.
"Page *x* of *y*" choice list	Enables navigation to any page of content items in the search results list. This feature is displayed at the top and bottom of the search results page only when more than one page of content items is returned.
Arrow buttons	**Forward**: Advances to the next search results page in a series. **Back**: Returns to the previous search results page in a series.

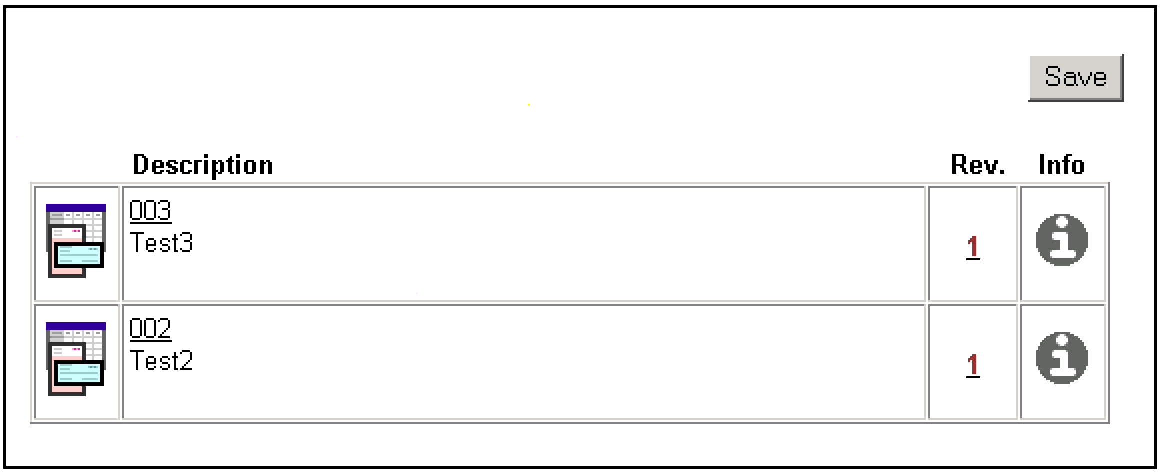
<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>Actions choice list</td><td>Allows you to select an action to perform on the search results list. Actions include saving the search to the My Stellent tray (page 4-22), or selecting a viewing option for the list:
Headline— A single line list of search results with no thumbnail image is displayed.
Thumbnail— A thumbnail image is displayed.
Classic— A thumbnail image and descriptive text is displayed.
</td></tr>
<tr><td>ID column</td><td>Displays the content ID of a content item. Clicking the content ID of a selected item either displays a web-viewable version of the content, or prompts you to select to save the file to your local drive or open the document with an associated program.</td></tr>
<tr><td>Title column</td><td>Displays the title of a content item.</td></tr>
<tr><td>Date column</td><td>Displays the date that content item was checked in.</td></tr>
<tr><td>Author column</td><td>Displays the author of the content item.</td></tr>
</table>

Feature	Description
Actions column	Includes the Info icon and the Actions Menu icon. **Info**— Displays the content information page (page 6-6) for the selected content item. **Actions Menu**—Contains the following options: • The Content Information link displays the content information page (page 6-6) for the selected content item. • The Check Out link checks out the selected content item and displays the check-out confirmation page (page 8-11). • The Check In Similar link displays the content check-in form (page 7-3) with some metadata fields already filled in. • The Send Link by E-mail link opens a new e-mail message that contains a URL to the selected content item. 
Thumbnail (Thumbnail and Classic views)	Displays a small image of the content item or an icon indicating the content type of the content item. Clicking the thumbnail of a selected item either displays a web-viewable version of the content, or prompts you to select if you want to save the file to your local drive or open the document with an associated program.
Description column (Classic view)	Shows the content ID and title of the content item. Clicking the content ID link displays the web-viewable file.

Feature	Description
Rev. link (Classic view)	Shows the latest released revision of the content item. Clicking the link displays the revision history page for the content item (page 6-11).
Info icon (Classic view)	Displays the content information page (page 6-6) for the content item.

Tamino Search Results Page

This section describes the search results page for the Tamino search engine.

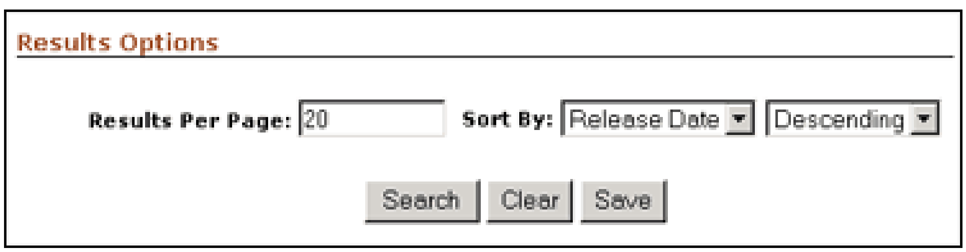


Links	Definition
List Navigation links	Enables navigation to the next or previous page of content items in the search results list. This feature is displayed at the top and bottom of the search results page only when more than one page of content items is returned.
Save button	Saves the search as a saved query link in the portal navigation bar (page 4-13). You are prompted to enter a title for the link.
Icon	Indicates the content type of the content item.

Links	Definition
Description column	Shows the content ID and title of the content item. Clicking the content ID link displays the web-viewable file.
Rev. link	Shows the latest released revision of the content item. Clicking the link displays the revision history page for the content item (page 6-11).
Info icon 	Displays the content information page (page 6-6) for the content item.

Results Options

The Results Options area of the Advanced Search Page (page 5-9) is used to control the display of the Search Results page.



Feature	Description
Results Per Page field	Specifies the maximum number of content items displayed on each search results page. The default is 25, and the range is from 0 to 100.
Sort By list	Specifies the field that the search results will be sorted on: **Release Date (default)**—Sorts by the Release Date metadata field. **Title**—Sorts alphabetically by the Title metadata field. **Score**—Sorts by the number of occurrences of search terms, or the proximity of search terms when a proximity operator such as <NEAR> is used. Applies only to full-text search.

Feature	Description
Order list	Specifies the sort order of the search results: **Descending (default)**—Sorts alphabetical results in Z-A order; numerical results in 9-0 order; and date results in newest to oldest order. **Ascending**—Sorts alphabetical results in A-Z order; numerical results in 0-9 order; and date results in oldest to newest order.
Search button	Displays a list of the content items that match the search criteria on a search results page (page 5-28). If no search criteria are specified, a list of all content items is displayed.
Clear button	Clears the search fields, but does not reset the results options settings.
Save button	Saves the search as a saved query link in the portal navigation bar (page 4-13). You are prompted to enter a title for the link.

Displaying Search Results

Use the following procedure to specify how to display the search results:

1. Display the home page search fields (page 5-4) or advanced search page (page 5-9).
2. Scroll down to the results options area (page 5-33) .
3. Set the **Results Per Page** to the maximum number of content items that you want to display on each search results page.
4. Specify the **Sort By** method and order.
5. Click **Search**.

Note: The Clear button clears the search fields, but does not clear the Results Options settings.

Use the following procedure to specify the search results view:

1. Click on the **Actions** choice list on a search results page (page 5-28) and select the desired view option.

Use the following procedure to change the default search results view:

1. Display the user profile (page 4-18).
2. Scroll down to **Search Template** option.
3. Click the Search Template choice list and select the desired search result view.
4. Click **Update**.

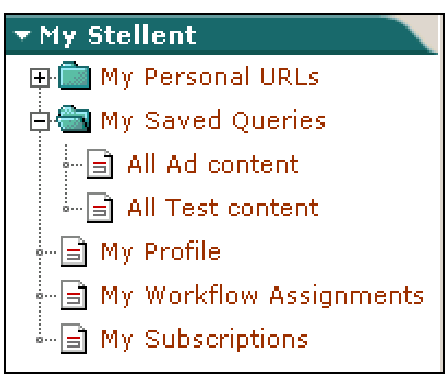
SAVING QUERIES

This section covers the following topics:

- ❖ About Saved Queries (page 5-35)
- ❖ Saving a Query (page 5-36)

About Saved Queries

To quickly display search results for searches that you perform often, you can save links to those searches in the *My Saved Queries* folder under the My Stellent tray (page 4-22) in the portal navigation bar (page 4-13). Once you have saved a query link, you can modify or delete the link from your Saved Queries page (page 4-25).



Saving a Query

Use the following procedure to save a search as a query link in your portal navigation bar (page 4-13):

1. Specify the search criteria you want to save.
   - ❖ On the Search tray (page 5-6), home page search fields (page 5-4), or advanced search page (page 5-9), enter the search criteria in the desired fields.
   - ❖ On the search results page (page 5-28), the criteria saved will be the criteria that were used to display the results.
2. Select **Save Search** from the **Actions** choice list on the search results page (page 5-28).

   A prompt dialog is displayed.
3. Enter a title for the saved query. This is the link that will be displayed in your portal navigation bar (page 4-13).
4. Click **OK**.

   The new link is displayed under the My Saved Queries folder in your portal navigation bar.

Note: See Editing Saved Queries (page 4-28) for information about modifying and deleting saved queries.

Chapter

6

WORKING WITH FILES

OVERVIEW

This section covers the following topics:

UNDERSTANDING A FILE'S LIFE CYCLE

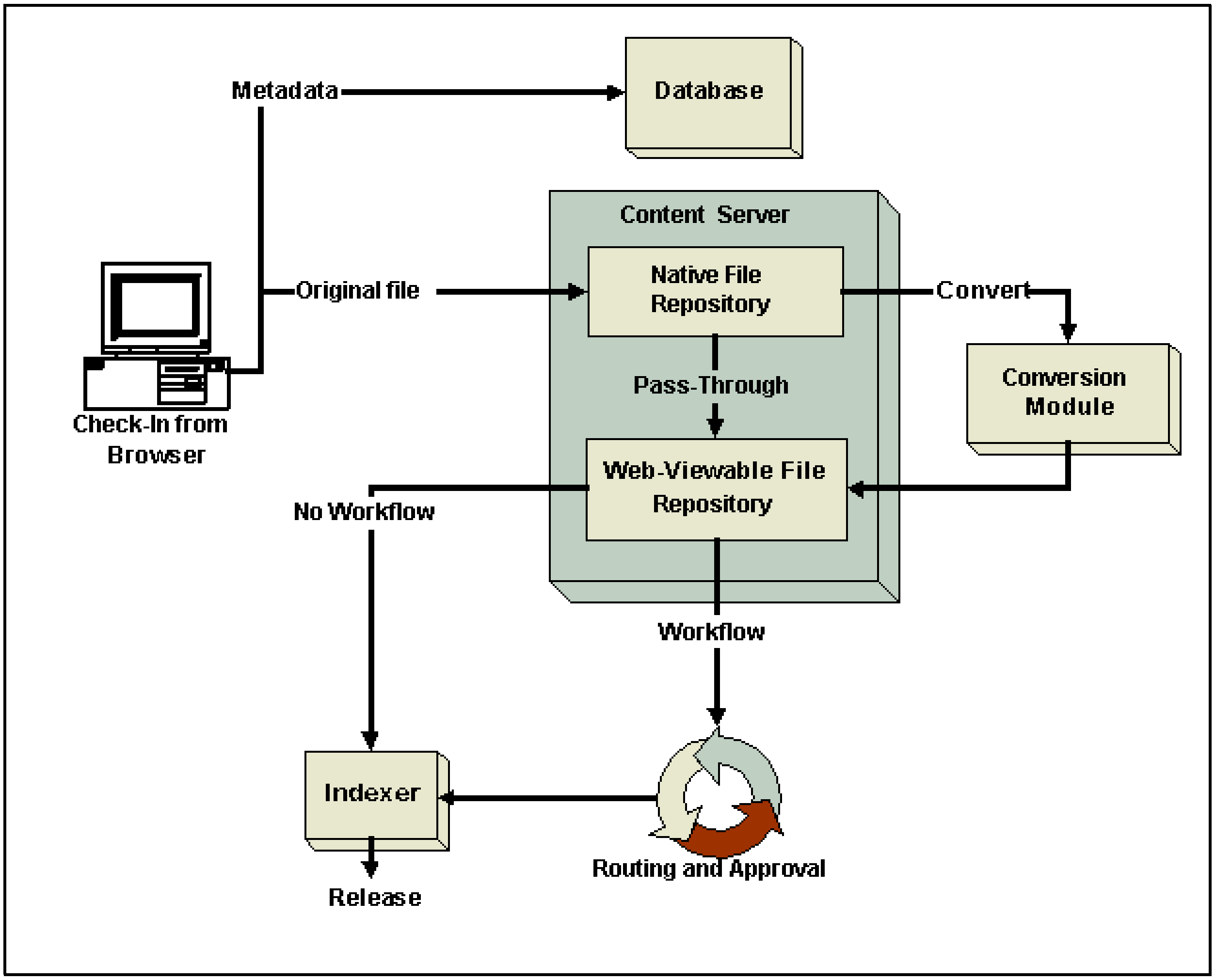
This section covers the following topics:

Revision Life Cycle

This section describes the process that a file goes through to become a content item revision in Stellent Content Server. The same process occurs when you check in a new file and when you check in a revision to an existing content item.

Note: See Revision Status (page 6-4) for information on the status of a file at each step in the process.

1. The contributor logs in to Stellent Content Server through a web browser and displays a check-in window. This user will typically be the author of the content item.
2. The author specifies the file name, enters information about the file (metadata), and designates security information (security group and account, if enabled).
3. Upon check-in, a copy of the native file goes into the native file repository, and the file's metadata is saved to the content information database.
4. If a conversion module is set up for the specified file format, the file is converted to a web-viewable format (for example, PDF). If the file cannot be converted, it is "passed through" as is (i.e., unconverted).
5. If the file was converted, the converted file is stored in the web-viewable file repository. If the file was passed through in unconverted form, a copy of the native file is stored in the web-viewable file repository.
6. If the file's metadata meets the criteria for an enabled workflow, it goes through the workflow process.
7. When the file meets all of the following criteria, the file contents or its metadata only are indexed in the web-viewable file repository:
   - Successful conversion or pass through
   - Approval at all steps of a workflow (if any)
   - Release date is reached
8. On the content item's release date, the file becomes available in the content server.
   - The content item can be found by browsing through the defined hierarchical link structure (the "Library"), or by searching for metadata or specific text.
   - When users view the content item, they can retrieve the web-viewable file, the native file, and/or the metadata.



See Also

– *Revision Status (page 6-4)*

– *Work In Progress Page (page 6-5)*

– *Determining the Revision Status (page 6-6)*

Revision Status

A content item revision goes through several statuses within its life cycle:

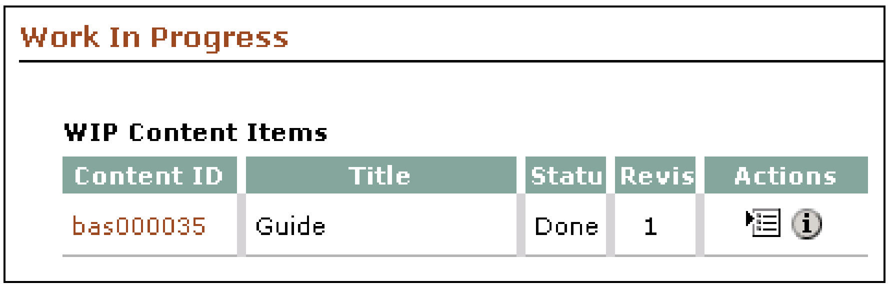
Status	Description
GenWWW	The file is being converted to web-viewable format or is being indexed, or has failed conversion or indexing.
Done	The file is waiting to be released on its specified release date.
Released	The revision is available in the content server.
Review	The revision is in a workflow and is being reviewed.
Edit	The revision is at the initial contribution step of a workflow.
Pending	The revision is in a basic workflow and is waiting for approval of all revisions in the workflow.
Expired	The revision is no longer available for viewing in the content server. (The revision was not deleted, but it can be accessed only by an administrator.)
Deleted	The revision has been deleted and is waiting to be completely removed from the content server during the next indexing cycle.

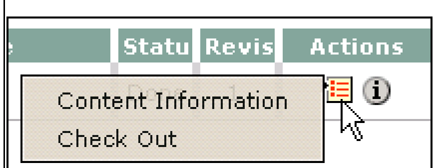
See Also

– *Revision Life Cycle (page 6-2)*
– *Work In Progress Page (page 6-5)*
– *Determining the Revision Status (page 6-6)*

Work In Progress Page

The Work In Progress page displays content items that are in the GenWWW or Done status. To access this page, click the **Work In Progress** on the Content Management tray (page 4-16).



Feature	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item. Clicking the Content ID link displays the web-viewable file.
Status column	Displays the revision status of the content item.
Revision Column	Displays the revision number of the content item.
Action icon ( )	Displays a contextual menu allowing you to check out the content item, or display the content information page for the content item (page 6-6). 
Info icon ( )	Displays the content information page for the content item (page 6-6).

See Also

– *Revision Status (page 6-4)*

– *Determining the Revision Status (page 6-6)*

Determining the Revision Status

Use the following procedure to determine the status of a content item:

1. Click the **Content Management** tray in the portal navigation bar (page 4-13).
2. Click **Work In Progress**.

   The Work in Progress page is displayed (page 6-5).
3. If the content item you are looking for is listed, the status is shown next to the content ID.
4. If the content item you are looking for is not listed, it could be released (i.e., have the Released status) or it could be in a workflow. Display the content information page for the content item (page 6-6). The revision status is shown in the Status field.

See Also

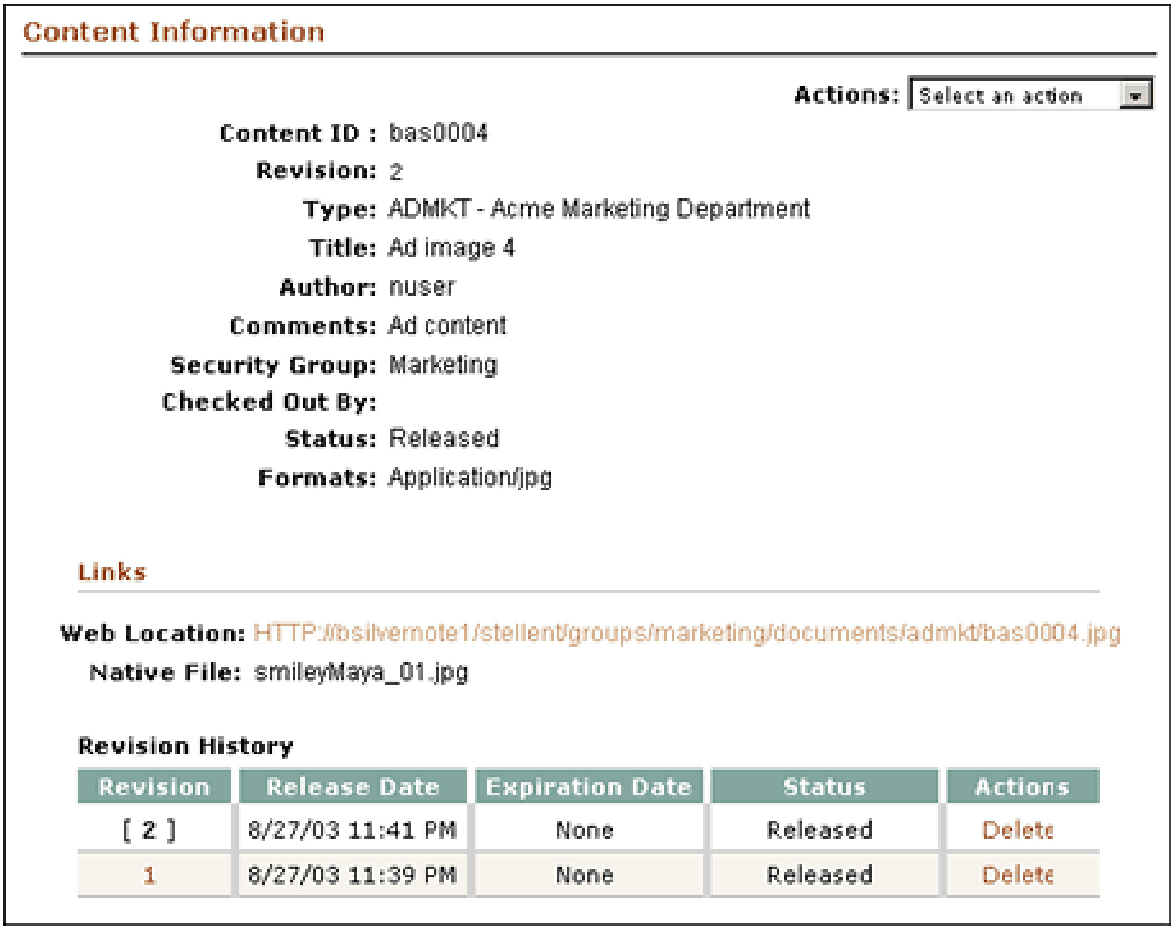
– *Revision Status (page 6-4)*

VIEWING CONTENT INFORMATION

This section covers the following topics:

Content Information Page

The content information page is used to view metadata and other information about a specific content item. For example, you can use this page to determine when a file was released or to see the content item's revision history. For more information on accessing the content information page, refer to Accessing Content Information (page 6-10).



Feature	Description
Content ID field	The unique identifier for the content item. **Note:** If your content server uses an Oracle or Tamino database, all content IDs are converted to uppercase letters automatically.
Revision field	The revision number of this revision.

Feature	Description
Type field	The category of the document.
Title field	The descriptive name for the content item.
Author link	The user who checked in this revision. Clicking the link opens your e-mail program with a new message addressed to this user.
Comments field	Additional notes about the content item.
Security Group field	An identifier that specifies access permission to the content item.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled on your system.
Checked Out By field	The user who has the content item checked out.
Status field	The revision status indicating where the file is in its life cycle. For details refer to Revision Status (page 6-4).
Formats field	The file format of the native file.
Web Location link	The unique web address for the web-viewable file. Clicking the link displays the web-viewable file.
Native File link	The file name of the native file. Clicking the link enables you to open or save a copy of the native file.

Feature	Description
Actions drop-down list	Performs the selected action: **Check Out**—Checks out the content item and displays the check-out confirmation page (page 8-11). This option is displayed only if the content item is not checked out. **Undo Check Out**—Cancels the content item check-out. This option is displayed only if the content item is checked out. You can undo check-out only on content items you checked out, or you must have Admin permission for the content item. **Update**—Displays the Info Update Form (page 6-13), which enables you to change the content item's metadata. **Check In Similar**—Displays the content check-in form (page 7-3) with the current content item's metadata already filled in. **Send link by e-mail**—Opens your e-mail program with a new message that contains a link to the URL (web address) of the web-viewable file. **Subscribe**—Displays the Subscriptions page (page 6-18), which enables you to be notified of new revisions to the content item. This button is displayed if you have not subscribed to the content item. **Unsubscribe**—Cancels your subscription to the content item. This option is displayed if you have subscribed to the content item and no criteria subscriptions are enabled on your system. For details refer to About Subscriptions (page 6-17). **Subscriptions**—Displays the Subscriptions page (page 6-18). This option is displayed if you have subscribed to the content item and criteria subscriptions are enabled on your system. For details refer to About Subscriptions (page 6-17).
Revision History section	Shows the complete revision history of the content item. For details refer to Revision History (page 6-11).

Accessing Content Information

Use any of the following procedures to view the content information page for a content item (page 6-6):

- From the search results page (page 5-28), click the **Info icon** ( ) to view the Content Information page for that file.
- From the search results page (page 5-28), click the **Action icon** ( ) to open a contextual menu and choose Content Information.
- From the check-in confirmation page (page 7-19), click the **Content Info** link to view the content information page for the file you just checked in.

Working with File Revisions

This section covers the following topics:

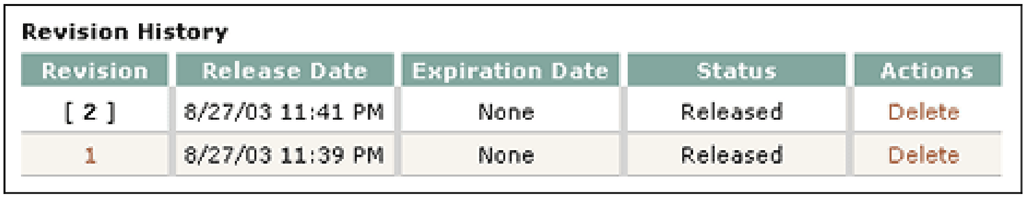
- About Revisions (page 6-10)
- Revision History (page 6-11)
- Viewing the Revision History (page 6-11)
- Deleting Revisions (page 6-12)

About Revisions

Each time that you check out a file and check it back in, Stellent Content Server creates a new revision of that file. The new revision has the same content ID as the previous revision, but the native file and the metadata can be the same or different. The system stores the previous versions of a file, so you can review them as necessary.

Revision History

The Revision History section of the content information page (page 6-6) is used to view and delete revisions of a content item.



Feature	Description
Revision column	Clicking a revision number displays the content information page for that revision (page 6-6):
Release Date column	The date and time the revision was released.
Expiration Date column	The date and time the revision will no longer be available for searching or viewing in the content server, if any.
Status column	The revision status indicating where the file is in its life cycle. For details refer to Revision Status (page 6-4).
Actions column	Clicking the Delete option removes the revision from the content server. You must have delete permission for the content item to delete a revision.

Viewing the Revision History

Use either of the following procedures to view the revision history for a content item:

❖ From the content information page for a content item (page 6-6), scroll to the bottom of the page to view the revision history (page 6-11).

❖ From the search results page (page 5-28), click the Rev link for the revision to view revision history (page 6-11).

Deleting Revisions

Use the following procedure to delete a revision from the content server:

Note: You must have delete permission for the content item to delete a revision.

1. Display the content information page for the content item (page 6-6).
2. In the Revision History section, click the **Delete** button for the revision you want to delete.

   You are asked to confirm the deletion.
3. Click **OK** to delete the revision.

The revision is unavailable in the content server immediately, and will be permanently deleted from the system during the next indexing cycle.

UPDATING METADATA

This section covers the following topics:

About Updating Metadata

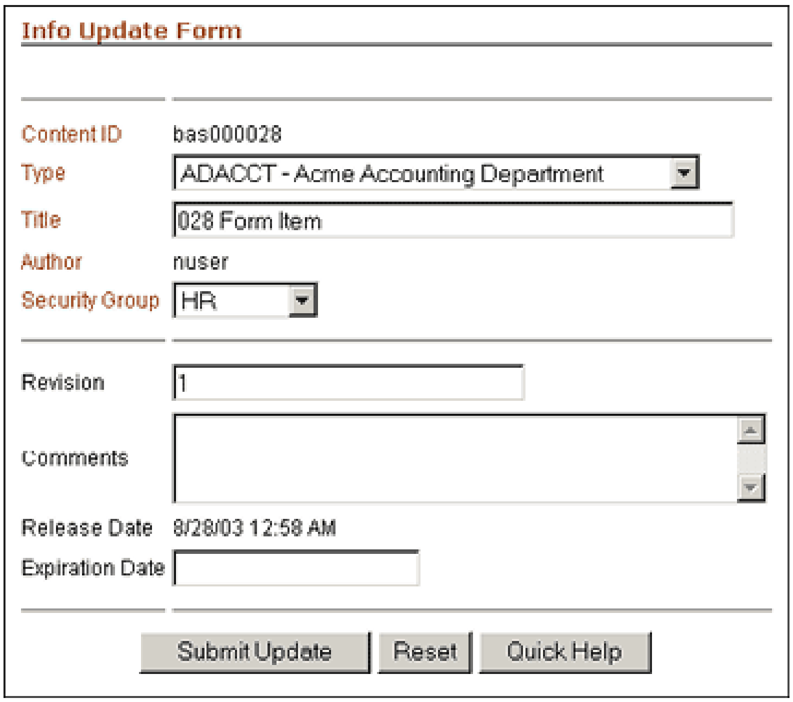
There are two ways to change the metadata of an existing content item:

❖ Change the metadata while checking in a revision to the file. For details refer to Checking In a Revised File (page 7-10).

❖ Update the metadata without creating a new content item revision. For details refer to Updating Metadata (page 6-15).

Info Update Form

The Info Update Form is used to change a content item's metadata without creating a new revision. To access this page, select **Update** from the Actions drop-down list on the content information page for a content item (page 6-6).



Feature	Definition
Content ID field*	The unique identifier for the content item. This value cannot be changed. **Note:** If your content server uses an Oracle or Tamino database, all content IDs are converted to uppercase letters automatically.
Type field*	The category of the file. You must select from a list of predefined values.
Title field*	A descriptive name identifying the revision. The maximum length is 80 characters, and double quotation marks (") cannot be used.

Feature	Definition
Author field*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission.
Security Group field*	An identifier that specifies access permission to the content item. You can select from the list of predefined values.
Account field	An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.
Revision field	The revision number.
Comments field	Additional notes about the content item. The maximum length is 255 characters.
Release Date field	The date that the current revision was released to the content server. This value cannot be changed.
Expiration Date field	The date and time that the revision will no longer be available for searching or viewing in the content server. • Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. • If a value is entered, the date is required; the time is optional.
Submit Update button	Saves the specified metadata.
Reset button	Resets all metadata fields to their original values.

* Required metadata fields

Updating Metadata

Use the following procedure to update content item metadata:

1. Display the content information page for the revision you want to update (page 6-6).
2. Select **Update** from the **Actions** drop-down list.

   The Info Update Form (page 6-13) is displayed.
3. Change the metadata fields as necessary.

Note: You cannot change the content ID or the release date. You can change the author only if you have Admin permission for the content item.

4. Click **Submit Update**.

Note: The **Reset** button returns the fields to their original values.

VIEWING A FILE

This section covers the following topics:

About Viewing a File

After you find a file, you can view it in several ways, depending on the original file format, the conversion setup for your system, and the configuration of your web browser. You may be able to view a web-viewable HTML rendition of the file in the web browser, with a helper application, with a plug-in, or in its native application. Depending on your access permissions, you may also be able to open or get a copy of the native file.

Viewing a Web-Viewable File

To view the web-viewable rendition of a file, you must have the appropriate helper application or web browser plug-in installed. For example, to view the PDF version of a file, you must have the Adobe Acrobat plug-in. For details refer to Setting Up Helper Applications and Plug-ins (page 4-5).

You can view a web-viewable file using one of the following methods:

- ❖ From a content information page (page 6-6), click the **Web Location** link.
- ❖ From a search results page (page 5-28), click the Content ID link in the ID column (Headline view) or Description column (Classic View), or the thumbnail (Classic and Thumbnail views).

If a web-viewable file does not exist, or you do not have the correct helper application or plug-in installed, you will be prompted to either save the file or open it in its native application. For details refer to Viewing a Native File (page 6-16).

Viewing a Native File

When you view the native file of a content item, you are prompted to either save a copy of the file or open it in its native application. If you choose to open the file, you are actually opening a copy of the native file that is stored in a temporary location on your hard drive; you are not opening the native file that is stored in the content server repository.

You can access a native file using one of the following methods:

- ❖ From a content information page (page 6-6), click the **Get Native File** link.
- ❖ From a check-out confirmation page (page 8-11), click the **Native File Link**.
- ❖ From a workflow review notification (page 9-5), click the **Native File** link.

SUBSCRIBING TO NEW REVISIONS OF A CONTENT ITEM

This section covers the following topics:

About Subscriptions

Subscriptions enable you to be notified automatically whenever a content item is revised. There are two types of subscriptions:

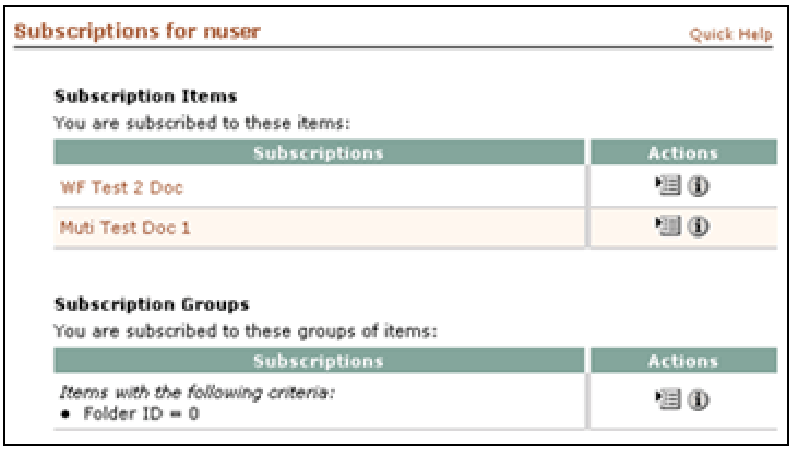
- ❖ **File subscription—**Users manually subscribe to individual content items.
- ❖ **Criteria subscription—**The system administrator sets up a subscription based on one or more metadata fields. When a user subscribes to the Criteria subscription, they are automatically subscribed to all content items that match a particular value of those metadata fields.

  For example, the system administrator sets up a criteria subscription with *Author* as the criteria. Whenever you view a content information page (page 6-6), you can choose to subscribe to all content items checked in by the author of the current content item.

The system administrator can subscribe users to specific content items or to criteria subscriptions, but users have the ability to cancel these subscriptions.

Subscriptions Page

The Subscriptions page is used to view your current subscriptions. To access this page, click **My Subscriptions** under the My Stellent tray (page 4-22), or click **Subscriptions for *[User]*** on the user profile (page 4-18).

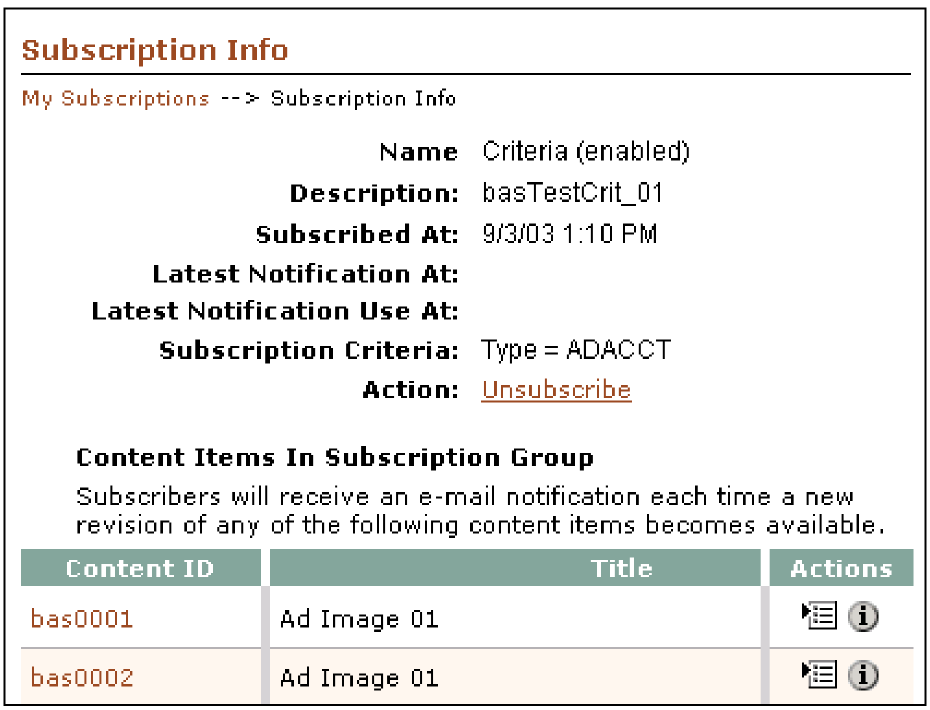


Field	Description
Subscription Items: lists all file subscriptions.	
Subscriptions column	Displays the title of the content item. Clicking the title link displays the web-viewable file.
Actions column	❖ **Actions icon ( ):** • **Content Information link:** Displays the content information page (page 6-6). • **Unsubscribe link:** Cancels your subscription to the content item. This link is displayed only if you are already subscribed. ❖ **Info icon ( ):** Display the content information page (page 6-6).
Subscription Groups: lists all criteria subscriptions.	
Subscriptions column	Displays the subscription criteria for the content group.

Field	Description
Actions column	❖ **Actions icon ():** • **Subscription Info link:** Displays the Subscriptions Info page (page 6-19). • **Unsubscribe link:** Cancels your subscription to the subscription group. ❖ **Info icon ():** Displays the Subscriptions Info page (page 6-19).

Subscription Info Page

The Subscription Info page is used to identify when you were subscribed to a file or group of files and when you were last notified about a new revision. To access this page, select **Subscription Info** from the Actions contextual menu (), or click the **Info** icon ().

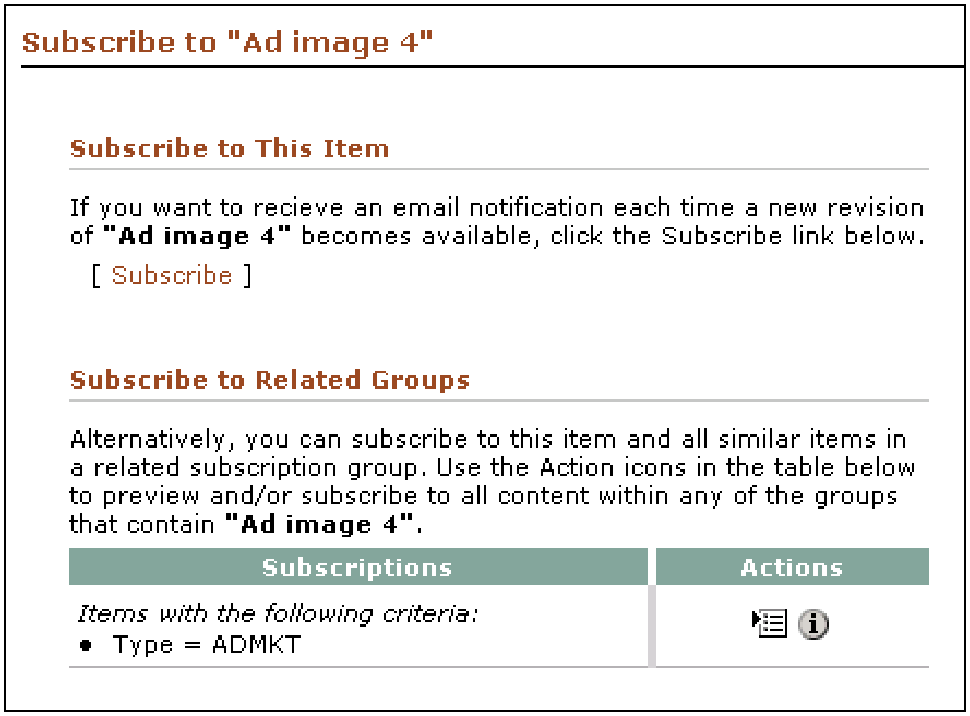


Field	Description
Breadcrumb links	Displays a hierarchical navigation within the content server. Located just below the page title.
Name field	The name of the subscription.
Description field	The description assigned by the system administrator.
Subscribed At field	The date and time that you subscribed to the file or your system administrator subscribed you to the file.
Latest Notification At field	The most recent date and time that you were sent an e-mail notification from this subscription.
Latest Notification Use At field	The most recent date and time that you accessed a content item from an e-mail notification from this subscription.
Subscription Criteria	Shows the criteria for the subscription.
Action field	Clicking **Unsubscribe** cancels your subscription.
Content Items in Subscription Group: lists all items in the subscription.	
Content ID column	Shows the content IDs of the content items included in the subscription. Clicking a Content ID link displays the web-viewable file.
Title	Shows the titles of the content item included in the subscription.

Field	Description
Actions column	❖ **Actions icon ( ):** • **Content Information:** Displays the content information page for the item (page 6-6). • **Check In:** (Seen if content is checked out by user.) Displays the content check-in form (page 7-3). • **Check Out:** (Seen if content is not checked out.) Checks out the item and displays the check-out confirmation page (page 8-11). • **Check In Similar:** Displays the content check-in form (page 7-3) with the metadata fields filled in with information similar to this item. • **Send link by e-mail:** Opens a new e-mail with links to the content item's web-viewable and native files, as well as the content information page for the item (page 6-6). ❖ **Info icon ( ):** Displays the content information page for the item (page 6-6).

Subscribe To "*Item*" Page

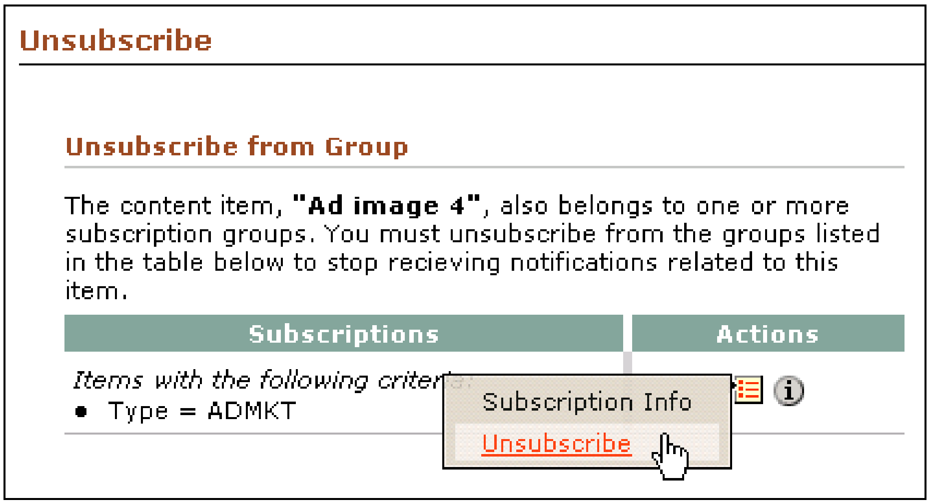
The Subscribe To "*item*" page is used to specify whether you want a file subscription or a criteria subscription. To access this page, select **Subscribe** from the Actions drop-down menu on the content information page for the item (page 6-6).



Feature	Description
Subscribe to This Item: information regarding the content item.	
Subscribe link	Subscribes to the content item and not the group.
Subscribe to Related Groups: information regarding the criteria group in which the item is included.	
Subscriptions column	Lists the criteria of the group to which the item belongs.
Actions column	❖ **Actions icon ( ):** • **Subscription Info:** Displays the Subscriptions Info page (page 6-19). • **Subscribe:** Subscribes to the specified criteria group. ❖ **Info icon ( ):** Displays the Subscriptions Info page (page 6-19).

Unsubscribe Page

The Unsubscribe page is used to cancel the subscription to a content item or group. To access this page, select **Unsubscribe** from the Actions drop-down menu on the content information page for the item (page 6-6).



Feature	Description
Subscriptions column	Lists the criteria of the group to which the item belongs.
Actions column	❖ **Actions icon ():** • **Subscription Info:** Displays the Subscriptions Info page (page 6-19). • **Unsubscribe:** Unsubscribes from the specified criteria group. ❖ **Info icon ():** Displays the Subscriptions Info page (page 6-19).

Subscribing to a Content Item

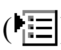
Use the following procedure to subscribe to a content item:

1. Display the content information page (page 6-6) for the content item that you want to subscribe to.
2. Select **Subscribe** from the **Actions** drop-down list.
   If the item is part of a criteria group, the Subscribe to "Item" page is displayed (page 6-21).
3. Click **Subscribe** under the Subscribe To This Item section.
4. If no e-mail address has been specified in your user profile (page 4-18), you are prompted to enter an e-mail address for this subscription. Enter an e-mail address and click **OK**.

Subscribing to a Criteria Group

Use the following procedure to subscribe to a criteria group:

1. Display the content information page (page 6-6) for the content item that you want to subscribe to, or for a content item that has the same metadata as a group of content items you want to subscribe to.
2. Select **Subscribe** from the **Actions** drop-down list.

   The Subscribe to "Item" page is displayed (page 6-21).
3. Select **Subscribe** from the Action contextual menu () corresponding to the group of content items to which you want to subscribe.
4. If no e-mail address has been specified in your user profile (page 4-18), you are prompted to enter an e-mail address for this subscription. Enter an e-mail address and click **OK**.

Viewing Your Current Subscriptions

Use the following procedure to view your current subscriptions:

1. Open the My Stellent tray (page 4-22) and select **My Subscriptions**.

   The Subscriptions page (page 6-18) is displayed, listing all of your current subscriptions.

Unsubscribing from a Content Item

Use the following procedure to unsubscribe from a file:

1. Open the My Stellent tray (page 4-22) and select **My Subscriptions**.

   The Subscriptions page (page 6-18) is displayed, listing all of your current subscriptions.

2. Select **Unsubscribe** from the Actions contextual menu () under **Subscription Items**.

Unsubscribing from a Criteria Group

Use the following procedure to unsubscribe from a file:

1. Open the My Stellent tray (page 4-22) and select **My Subscriptions**.

   The Subscriptions page (page 6-18) is displayed, listing all of your current subscriptions.

2. Select **Unsubscribe** from the Actions contextual menu () under **Subscription Groups**.

Chapter

7

Checking In Files

Overview

This section covers the following topics:

About File Check-In

Check-in is the process of submitting a file to the content server repository. You must have the correct permission to check a file into the content server. This permission is associated with your user name and password, which the system administrator assigns. During the check-in process, you will specify metadata for your file so that the content item can be found by drilling down or by searching.

Important: It is extremely important to know your organization's standards before you enter the metadata. The metadata helps users find the content item and determines where the file is stored in the content server.

You can check in content items as:

- ❖ A new file (page 7-8)
- ❖ A new file similar to an existing content item (page 7-10)
- ❖ A revised file (page 7-10)
- ❖ Multiple files (page 7-11)

PRIMARY AND ALTERNATE FILES

When you check in a file, the native file is called the *primary* file. You have the option to also specify an *alternate* file, which is typically one of the following:

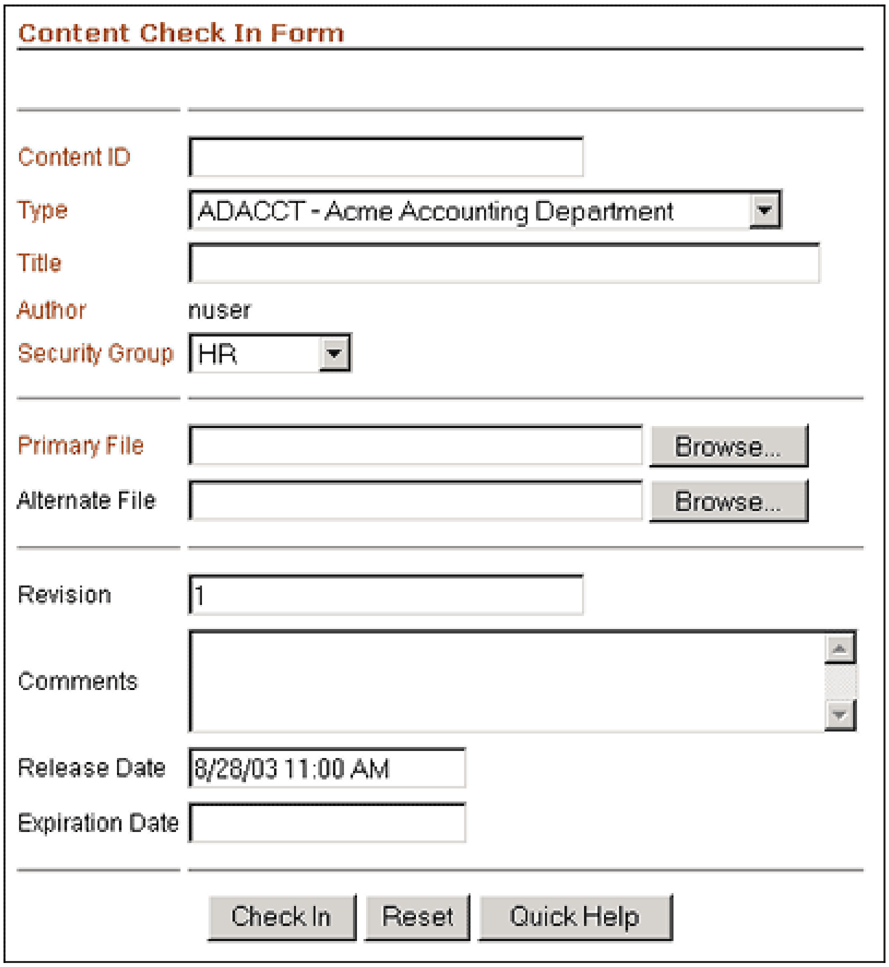
- ❖ **A web-viewable version of the native file.** This is typically used when the native file cannot be converted by the content server, or you want to convert the native file manually.
- ❖ **A file in a format that can be converted to a web-viewable file.** This is typically used when the native file cannot be converted by the content server, and you have an alternate file format that can be converted by the system (such as PostScript).
- ❖ **A file explaining what the native file contains.** Typical uses include providing a text file that describes the contents of a compressed file (such as a zip file) and supplying documentation for an executable file.

For example, if you are checking in a Word document that has several graphics, you could compress the Word file and all the original graphics into a zip file and then check in that zip file as the primary file. As the alternate file, you could specify the Word document itself (which could be converted to PDF by the Content Server), a text file that describes the contents of the zip file, or a PDF file that you created manually.

Note: The file extension of the alternate file (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*).

CONTENT CHECK-IN FORM

The content check-in form is used by contributors to check files into Stellent Content Server. To access this page, click **New Check In** on the Content Management tray (page 4-16).



<table>
<tr><th>Feature</th><th>Definition</th></tr>
<tr><td>Content ID field*</td><td>The unique identifier for the content item.
• Duplicate names are not allowed.
• Maximum length is 30 characters.
• The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and the symbols ; ^ ? : @ & + " # % < > * ~ |
Note: If a content ID is already filled in or if this field is not displayed, the system is set up to generate content IDs automatically.
Note: If your content server uses an Oracle or Tamino database, all content IDs are automatically converted to uppercase letters.</td></tr>
<tr><td>Type field*</td><td>The category of the file. You must select from a list of predefined values.</td></tr>
<tr><td>Title field*</td><td>A descriptive name identifying the revision.
• Maximum length is 80 characters.
• Double quotation marks " cannot be used.</td></tr>
<tr><td>Author field*</td><td>The user who created or revised the content item.
Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission.</td></tr>
<tr><td>Security Group field*</td><td>The security group is a set of files with the same access permission.</td></tr>
<tr><td>Account field</td><td>An identifier that specifies access permission to the content item. This field is displayed only if accounts are enabled for your system.</td></tr>
</table>

Feature	Definition
Primary File field*	The path and file name of the native file being checked in. • Maximum length is 80 characters. • The maximum file extension length (after the period) is eight characters. • Click the Browse button to navigate to and select the file.
Upload Multiple Files check box	**Selected—**Clicking the Browse button displays the Upload Files window, which is used to select the files to be included in the zip file that will be created as the primary file. **Clear—**Clicking the Browse button displays the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your user profile (page 4-18).
Format field*	The application format for the file name entered in the Primary File field. • This field appears only if it has been enabled by the system administrator. • If the **use default** option is selected, Stellent Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, etc. • If any other option is selected, Stellent Content Server ignores the file extension and uses the selected format to determine how to convert the file.

Feature	Definition
Alternate File field	The path and file name of an alternate, web-viewable file or a file that can be converted to web-viewable format. • The file extension (after the period) cannot be the same as that of the primary file (for example, both files cannot end in *.doc*). • Maximum length is 80 characters. • The maximum file extension length (after the period) is eight characters. • Click the Browse button to navigate to and select the file.
Upload Multiple Files check box	**Selected—**Clicking the Browse button displays the Upload Files window, which is used to select the files to be included in the zip file that will be created as the alternate file. **Clear—**Clicking the Browse button displays the standard file selection window. This check box appears only if the system administrator has enabled the upload applet and you have selected the Enable Upload Applet check box in your user profile (page 4-18).
Format field	The application format for the file name entered in the Alternate File field. • This field appears only if it has been enabled by the system administrator. • If the **use default** option is selected, Stellent Content Server converts the file format based on its file name extension. For example, *test.doc* is a Word file, *test.xls* is an Excel file, etc. • If any other option is selected, Stellent Content Server ignores the file extension and uses the selected format to determine how to convert the file.

Feature	Definition
Revision field	The revision increments automatically with each check-in of the content item, so generally, you should not change this value.
Comments field	Additional notes about the file. • Maximum length is 255 characters.
Release Date field	The date and time that the revision is available for viewing in Stellent Content Server. • Defaults to the date and time the file is checked in. • If another date is entered, the revision remains in Done status until the specified date. For details refer to Revision Status (page 6-4). • The date is required; the time is optional.
Expiration Date field	The date and time that the content item will no longer be available for viewing in the content server. • Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. • If a value is entered, the date is required; the time is optional. **Note:** By default, all revisions of the content item will expire when the current revision expires.
Custom fields	Any custom metadata fields for your system will be displayed on this page.

* Required metadata fields.

CHECKING IN SINGLE FILES

This section covers the following topics:

See Also

– *Understanding a File's Life Cycle (page 6-1)*

– *About File Check-In (page 7-1)*

– *Checking In Multiple Files (page 7-11)*

Checking In a New File

Use the following procedure to check in a new file:

1. Click the **Content Management** tray (page 4-16).
2. Click **New Check In**.

   The content check-in form is displayed (page 7-3).
3. If applicable, enter a unique name in the Content ID field.

Note: Content ID values are generated automatically by the content server if your system administrator has enabled this feature. However, you can override an automatically generated content ID by entering a new value.

Note: If your content server uses an Oracle or Tamino database, all content IDs will be converted to uppercase letters automatically.

4. From the **Type** list, select the option that best describes the file.
5. Enter a descriptive title in the **Title** field.
6. From the **Security Group** list, select the security group for the content item. Keep in mind that this content item will be available to users who have permission to the specified security group.
7. If accounts are enabled for your system, select an option from the **Account** list, or enter a new account name. Keep in mind that this content item will be available to users who have permission to the specified account.

8. Specify a **primary file** using one of these methods:
   - Click **Browse** next to the Primary File field. Navigate to and select the native file, and then click **Open**.
   - Enter the complete path name and file name of the native file in the Primary File field (for example, *c:/My Documents/ABC Project/MyFile.doc*).
9. If the **Format** field is displayed under the Primary File field, select the conversion format for the file.
   - If the **use default** option is selected, Stellent Content Server converts the file format based on its file name extension.
   - If any other option is selected, Stellent Content Server ignores the file extension and uses the selected format to determine how to convert the file.
10. (Optional) Specify an **alternate file** by browsing or entering the path name and file name.
    - The alternate file must have a different file extension than the primary file.
    - The alternate file is typically in a web-viewable format or a format that can be converted to a web-viewable file, such as *.pdf*, *.txt*, *.doc*, etc.
11. If the **Format** field is displayed under the Alternate File field and you specified an alternate file, select a conversion format for the file.
    - If the **use default** option is selected, Content Server converts the file format based on its file name extension.
    - If any other option is selected, Content Server ignores the file extension and uses the selected format to determine how to convert the file.
12. Accept the default revision in the **Revision** field. (You should change the revision only if there is a specific reason to do so.)
13. Enter any notes about the file in the **Comments** field.
14. Use the default release date, or enter a future release date in the **Release Date** field.
15. If you want the file to be unavailable in the content server on a particular date, enter a date in the **Expiration Date** field.
16. If applicable, fill in any of your organization's custom metadata fields.
17. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the check-in confirmation page is displayed (page 7-19).

Note: Depending on the type of file you checked in and how your system is configured, it may take a few minutes for the file to be converted and indexed before it is available through a search or by drilling down.

Checking In a Similar File

If you have a new file to check in that has similar metadata to an existing content item, you can use an existing content item as a model for the new file. The system then pre-fills metadata fields in the content check-in form with values from the “model” content item.

Use the following procedure to check in a similar file:

1. From the check-in confirmation page (page 7-19) or the content information page (page 6-6) of the existing content item, click **Check In Similar**.

   The content check-in form (page 7-3) is displayed. Most of the metadata fields will display the same values as those assigned to the existing content item.

2. Continue with step 3 of the procedure to check in a new file (page 7-8), changing or adding metadata values and member permissions as necessary.

Checking In a Revised File

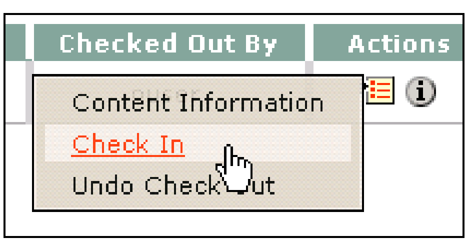
Use the following procedure to check in a revised file:

1. Click the **My Stellent** tray.

2. Click **My Checked-out Content**.

   The Checked Out Content for *[User]* page is displayed (page 8-3).

3. Click the Action icon for the appropriate content item to display a contextual menu and select **Check In**. You can now check in the revised file using the standard procedure to check in a file (page 7-8).



Please note the following considerations:

- ❖ The content ID that was assigned to the original file cannot be changed.
- ❖ The name of the original file is displayed for reference; however, the revised file that you are checking is not required to have the same name.
- ❖ The revision has been incremented by one.

CHECKING IN MULTIPLE FILES

This section covers the following topics:

See Also

– *Checking In Single Files (page 7-8)*

About Multiple File Check-In

You can check in multiple files as a compressed zip file that is stored as a single content item. Checking in multiple files is useful for a variety of situations, including:

- ❖ Publishing software, such as FrameMaker—You can check in an entire book that contains multiple chapters.
- ❖ Page layout software, such as QuarkXpress—You can check in the Quark file and all its supporting files (fonts, pictures, etc.).
- ❖ CAD software, such as Solidworks—You can check in an assembly made of several files.
- ❖ Related files—You can check in a group of related files, such as a set of JPG files for a website.

There are two ways to check in multiple files:

- ❖ Create a compressed zip file **outside** of Stellent Content Server using a compression program such as WinZip or PkZip, and then check in this zip file as a single file. For details refer to Checking In a New File (page 7-8).
- ❖ Create a compressed zip file **within** Stellent Content Server by selecting the **Upload Multiple Files** check box in the content check-in form (page 7-3). Checking in multiple files using this method is possible if all of the following conditions are true:
  - The system administrator has enabled the upload applet on the content server.
  - The **Enable upload applet** check box ise selected in your user profile (page 4-18).
  - You are using a Java-enabled browser.

  For details refer to Checking in Multiple Files Using Upload (page 7-17).

Upload Applet Requirements

You can use the upload applet to check in multiple files only if the following conditions are all true:

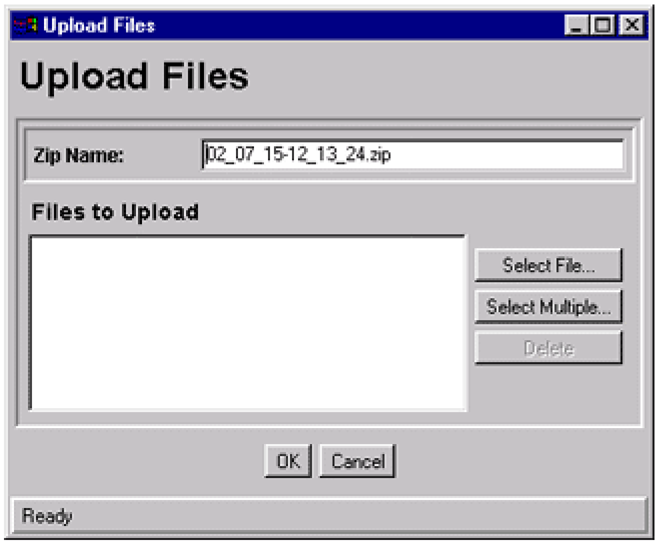
- ❖ The system administrator has enabled the upload applet on the content server.
- ❖ The **Enable upload applet** check box is selected in your user profile (page 4-18).
- ❖ You are using a Java-enabled web browser.

The upload applet requires permission to access the local drive. When you access the content check-in form (page 7-3) for the first time after enabling this applet, you may see a Java security warning:

- ❖ In Netscape, you are prompted by a Java Security message box. When you encounter this message box, click **Grant**. If you do not want to be prompted again with this message box, select **Remember this decision**, and then click **Grant**.
- ❖ In Internet Explorer, you are prompted by only one security warning. Click **Yes** to give full permissions. If you do not want to be prompted again with this message box, select **Always trust software from Stellent Incorporated**, and click **Yes**.

Upload Files Window

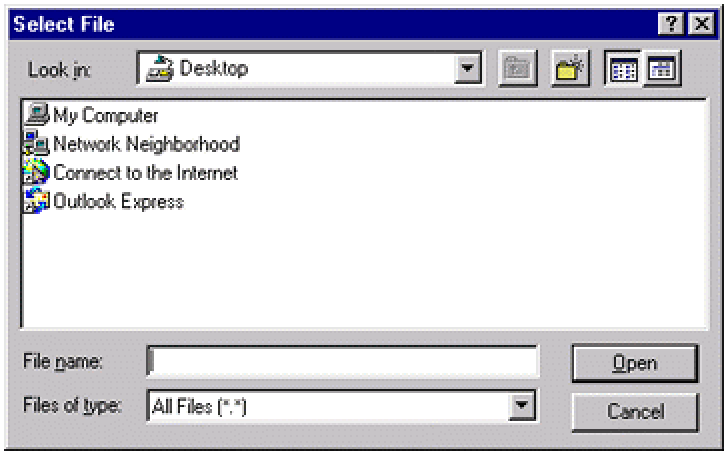
The Upload Files window is used to create a zip file as the primary or alternate file that will be checked in to the content server (see Checking in Multiple Files Using Upload on page 7-17). To access this window, select an **Upload Multiple Files** check box on the content check-in form (page 7-3), and click the corresponding **Browse** button.



Feature	Description
Zip Name field	The name of the zip file that will be checked in to the content server repository.
Files to Upload list	Lists the files that will be included in the zip file.
Select File button	Displays the Select File window (page 7-14), which is used to select individual files.
Select Multiple button	Displays the Select Files window (page 7-14), which is used to select multiple files from the same directory.
Delete button	Deletes the selected files from the Files to Upload list.
OK button	Creates a zip file and enters the file name in the Primary File field or Alternate File field.
Cancel button	Closes the Upload Files window without creating a zip file.

Select File Window

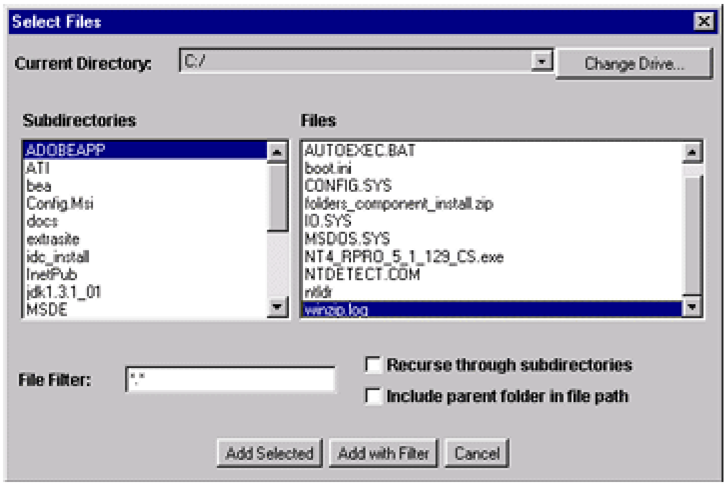
The Select File window is used to select individual files to be included in the uploaded Zip file (see Checking in Multiple Files Using Upload on page 7-17). To access this window, click **Select File** in the Upload Files window (page 7-13).



Feature	Description
Look in field	Select the directory where the file is located.
Contents list	Select the file to be included in the zip file.
File name field	You can filter the files by typing a wildcard expression, such as *doc*.**.
Files of type field	You can filter the files in the current directory by selecting a file type.
Open button	Places the selected file in the Files to Upload list in the Upload Files window.
Cancel button	Closes the Select File window without selecting any files.

Select Files Window

The Select Files window is used to select multiple files from the same directory to be included in the uploaded zip file (see Checking in Multiple Files Using Upload on page 7-17). To access this window, click **Select Multiple** in the Upload Files window (page 7-13).



Feature	Description
Current Directory field	Shows the directory currently selected.
Change Drive button	Displays the Change Drive window (page 7-16).
Subdirectories list	Select the subdirectory where the files are located. Double-click the “..” entry in this list to navigate to the parent directory.
Files list	Select specific files to be included in the zip file. • Holding down the Ctrl key and clicking on files selects non-contiguous files. • Holding down the Shift key and clicking two files selects contiguous files.
File Filter field	All files that meet the criteria in this field will be selected when the Add with Filter button is clicked. • You can use the asterisk * (zero or more characters) and question mark ? (one character) as wildcards. • This field has no effect when the Add Selected button is clicked.

Feature	Description
Recurse through subdirectories check box	Selects all files in all subdirectories of the current directory when the Add with Filter button is clicked. This check box has no effect when the Add Selected button is clicked.
Include parent folder in file path check box	Store path information from the parent folder with the files you are adding when the Add with Filter button is clicked. This check box has no effect when the Add Selected button is clicked.
Add Selected button	Places the selected files in the Files to Upload list in the Upload Files window (page 7-13).
Add with Filter button	Places files in the Files to Upload list in the Upload Files window (page 7-13), based on the *File Filter* field, *Recurse through subdirectories* check box, and *Include parent folder in file path* check box.
Cancel button	Closes the Select Files window without selecting any files.

Change Drive Window

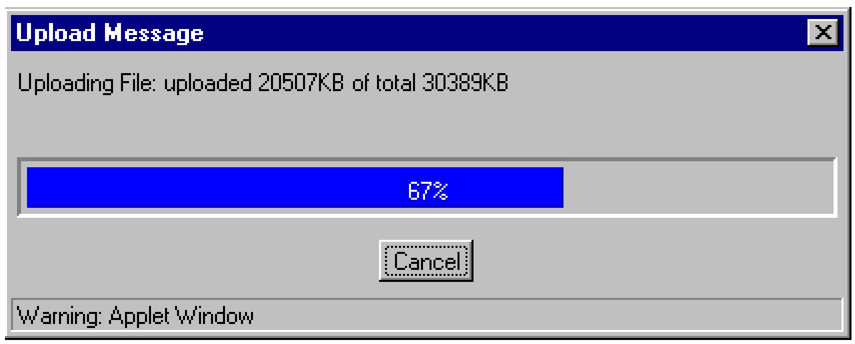
The Change Drive window is used to change the drive where files to be included in the uploaded zip file are located (see Checking in Multiple Files Using Upload on page 7-17). To access this window, click **Change Drive** in the Select Files window (page 7-14).

Feature	Description
Drive list	Select the drive where the files to be selected are located.
OK button	Changes the drive displayed in the Current Directory field in the Select Files window (page 7-14).

Feature	Description
Cancel button	Closes the Change Drive window without changing the drive.

Upload Message Screen

The Upload Message screen shows the upload progress when the chunking function is enabled. If the chunking function is not enabled on your system, this screen will not appear.



Checking in Multiple Files Using Upload

Use the following procedure to check in multiple files as a single content item in a compressed zip format using the upload applet:

Note: You can also check in multiple files by creating a compressed zip file **outside** of Stellent Content Server using a compression program such as WinZip or PkZip, and then checking in the zip file as a single file. For details refer to Checking In a New File (page 7-8).

1. Make sure that you have enabled the upload applet in your user profile. For details refer to Editing Your User Profile (page 4-27).
2. Follow the general check-in procedure for a new file (page 7-8), similar file (page 7-10), or revised file (page 7-10).
3. Before specifying the primary file or alternate file, select the corresponding **Upload Multiple Files** check box.
4. Click the corresponding **Browse** button.

   The Upload Files window is displayed (page 7-13).

5. (Optional) Change the default **Zip Name** to a more descriptive file name. Make sure that the file name ends in **.zip**.
6. Select the files to be checked in.

   Use the following procedure to select files one at a time:

   a. Click **Select File**.

      The Select File window is displayed (page 7-14).

   b. Navigate to the file to add, and click **Open**.

      The file is displayed in the Files to Upload list.

   c. Repeat the previous two steps as necessary to select individual files.

   Use the following procedure to select multiple files at a time:

   a. Click **Select Multiple**.

      The Select Files window is displayed (page 7-14).

   b. To select the drive where the files are located, click **Change Drive**, select the drive on the Change Drive window (page 7-16), and click **OK**.
   c. Navigate to the directory and/or files to add. The **Subdirectories** list shows the contents of the directory where you are currently located. To navigate to the parent directory, double-click the ".." entry in the Subdirectories list.
   d. To select multiple files in the **Files** list:
      - To select non-contiguous files, hold down the Ctrl key and click on each file.
      - To select contiguous files, hold down the Shift key and click the first and last file.
   e. To narrow the selection of files, use the **File Filter** field. For example, the filter **.doc* selects all files with a *.doc* extension.
   f. To select all files in all subdirectories of the current directory, select the **Recurse through subdirectories** check box.
   g. To store path information (from the parent folder) with the files you are adding, select the **Include parent folder in file path** check box.
   h. Click the button appropriate to your selection: **Add Selected** or **Add with Filter**.
   i. The selected files are displayed in the Files to Upload list.
   j. Repeat these steps as necessary to add files from other directories or drives.
7. Verify that the correct files are shown in the **Files to Upload** list, and click **OK**.

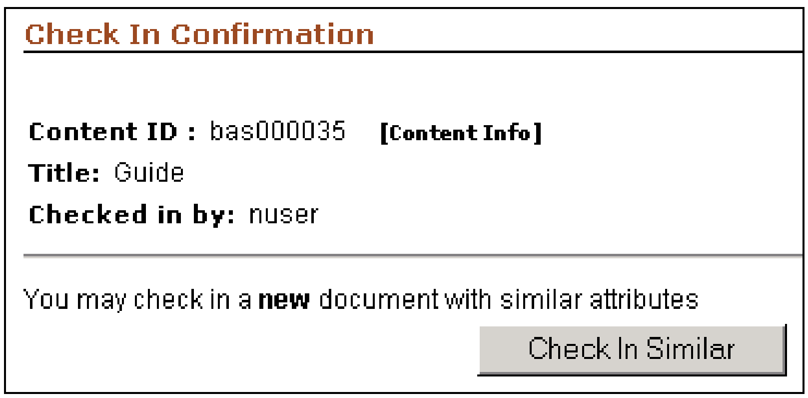
   The zip file name appears in the Primary File or Alternate File field.

8. Follow the general check-in procedure to complete the check-in. For details refer to Checking In a New File (page 7-8).

   If the chunking function is enabled, the Upload Message screen (page 7-17) displays a progress bar during upload.

CHECK-IN CONFIRMATION PAGE

The check-in confirmation page is displayed after you have checked in a content item successfully.



Feature	Description
Content ID field	The unique content ID that you entered during check-in or that was generated automatically by the system.
[Content Info] link	Displays the content information page (page 6-6) for the content item.
Title field	The title of the content item that you checked in.
Checked in by field	The login you used to check in the file.
Check In Similar button	Displays the content check-in form (page 7-3) with metadata values similar to the content item you just checked in already filled in.

IMPORTANT CONSIDERATIONS

Please note the following considerations

- ❖ Multi-Byte Characters (page 7-20)
- ❖ Checking in Microsoft Office XP Files (page 7-20)

Multi-Byte Characters

You should not use multi-byte characters (for example, Japanese or Korean) in content IDs and content types—even if Stellent Content Server is to be used in a multi-byte environment. The values of these fields are included in the URLs of content items, and limitations in current web technology prevent web servers and browsers from handling URLs with multi-byte characters correctly.

If you want to use multi-byte characters in content IDs and/or content types, you need to ask your content server system administrator if the **entire** content server environment—all servers and **all** clients—runs on operating systems that support multi-byte languages (for example, Japanese or Korean versions of Microsoft Windows). Otherwise errors may occur, such as links to PDF renditions of content items not working, Dynamic Converter failing to find content items, etc.

Checking in Microsoft Office XP Files

It is important to be aware of the following considerations when checking in Microsoft Office XP files:

- ❖ If your system is using a Verity search engine prior to version 4.5.1 and you check Microsoft Office XP files into Stellent Content Server, the native files will **not** be included in the search index. This is due to limitations in the third-party search engine technology used with Stellent Content Server.
- ❖ If your system is using Verity version 4.5.1 or greater, Office XP files **will** be indexed, or if your system uses PDF Converter to convert Microsoft Office XP files, the PDF versions of the files will be indexed.

Note: Check with your system administrator if you are uncertain which third-party search engine is used by your system, and how it handles full-text indexing of files.

Chapter

8

CHECKING OUT FILES

OVERVIEW

This section covers the following topics:

About File Check-Out

Check-out is the process of locking a content item so that no other users can revise it. You must have write permission to the content item to check out a file or undo a check-out. Only one user at a time can check out a file; however, multiple users can continue to view the released file.

There are two approaches to checking out files:

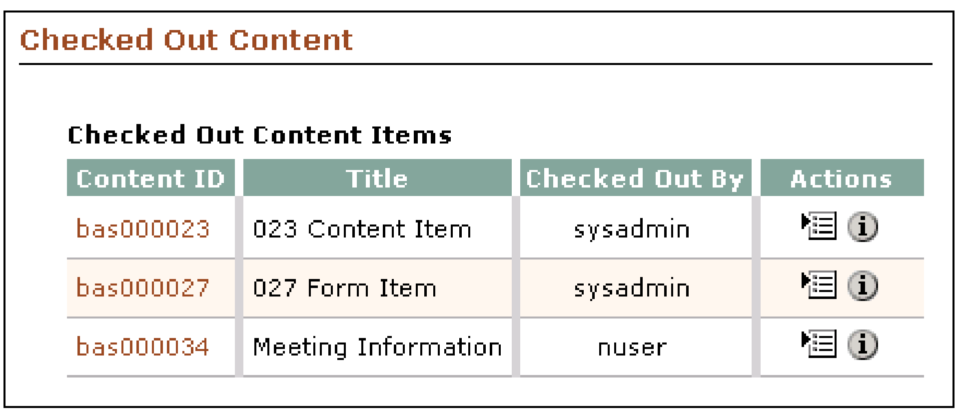
❖ For content items that could be revised by other users, it is a good idea to check out the file as soon as you know that you need to edit it. This notifies other users that you will be making changes and prevents them from checking in a new revision.

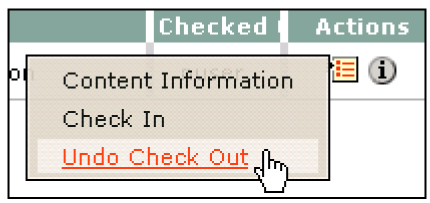
❖ For content items that are unlikely to be revised by other users, you can make revisions to a copy of the file, check out the content item, and immediately check it back in with the edited file.

Once you have checked out a content item, you can either check in a revision or undo the check-out.

Checked-Out Content Page

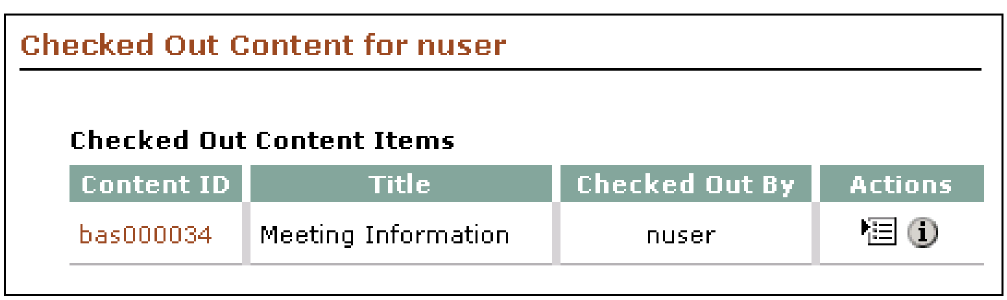
The checked-out content page is used to identify which files are checked out. To access this page, click **Checked Out Content** on the Content Management tray (page 4-16).

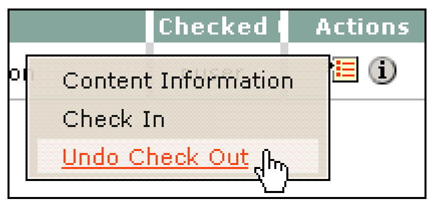


Feature	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item.
Checked Out By column	Displays the user name of the person who has checked out the content item.
Action icon ( )	Displays a contextual menu allowing you to display the content information page (page 6-6), check in the content item, or undo the check-out of the content item, depending on your access rights. 
Info icon ( )	Displays the content information page for the content item (page 6-6).

CHECKED-OUT CONTENT FOR *[User]* PAGE

The Checked Out Content for *[User]* page is used to identify which files are checked out by the current user. To access this page, click **My Checked-Out Content** under the My Stellent tray (page 4-22).



Feature	Description
Content ID link	Clicking the Content ID link displays the web-viewable file.
Title column	Displays the title of the content item.
Checked Out By column	Displays the user name of the person who has checked out the content item.
Action icon ( )	Displays a contextual menu allowing you to display the content information page (page 6-6), check in the content item, or undo the check-out of the content item, depending on your access rights. 
Info icon ( )	Displays the content information page for the content item (page 6-6).

CHECKING OUT SINGLE FILES

Use either of the following procedures to check out a single file:

- ❖ From a Content Information Page (page 8-4)
- ❖ From a Search Results Page (page 8-5)

From a Content Information Page

1. Display the content information page (page 6-6) of the content item you want to check out.
2. Select **Check Out** from the Actions drop-down list ( ).

   The Check-Out Confirmation page is displayed (page 8-11).
3. If applicable, click **Native File Link** to get a copy of the native file.

4. If a dialog window appears before the Save As window, choose to save the file to disk.
5. On the Save As window, navigate to the location where you want to save the file and click **Save**.
6. Start the native application (for example, Word, PowerPoint, etc.) and locate the file where you saved it in step 5.
7. Edit the file in its native application and then save the file.

From a Search Results Page

1. Search for content to view a search results list.
2. Select **Headline View** or **Thumbnail View** from the **Actions** drop-down list ( ).
3. Click the **Action** icon ( ) and select **Check Out** from the contextual menu.

   The Check-Out Confirmation page is displayed (page 8-11).
4. If applicable, click **Native File Link** to get a copy of the native file.
5. If a dialog window appears before the Save As window, choose to save the file to disk.
6. On the Save As window, navigate to the location where you want to save the file and click **Save**.
7. Start the native application (for example, Word, PowerPoint, etc.) and locate the file where you saved it in step 6.
8. Edit the file in its native application and then save the file.

CHECKING OUT MULTIPLE FILES

This section covers the following topics:

About Multiple File Check-Out

You can get a copy of multiple content items at one time using the download applet. When you download files, you also have the option to check out the content items and/or uncompress any compressed zip files.

Download Applet Requirements

You can use the download applet to check out multiple files only if the following conditions are all true:

The system administrator has enabled the download applet on the content server.

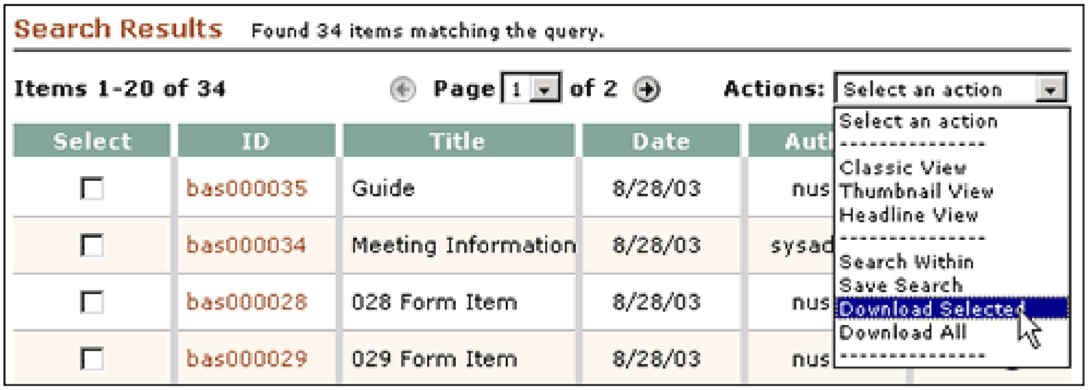
- ❖ The **Enable download applet** check box is selected in your user profile (page 4-18).
- ❖ You are using a Java-enabled web browser.

The download applet requires permission to access the local drive. When you access the content check-in form (page 7-3) for the first time after enabling this applet, you may see a Java security warning:

- ❖ In Netscape, you are prompted by a Java Security message box. When you encounter this message box, click **Grant**. If you do not want to be prompted again with this message box, select **Remember this decision**, and then click **Grant**.
- ❖ In Internet Explorer, you are prompted by only one security warning. Click **Yes** to give full permissions. If you do not want to be prompted again with this message box, select **Always trust software from Stellent Incorporated**, and click **Yes**.

Download Options on Search Results Pages

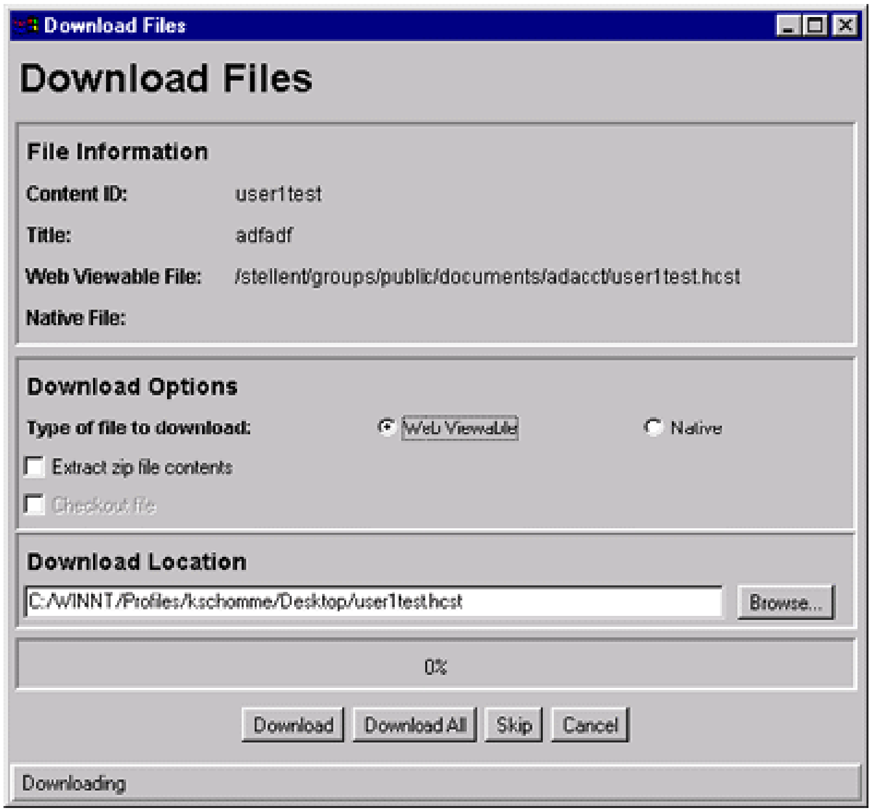
When the download applet is enabled, the following features are added to search results pages:



Feature	Description
Download Selected option on Actions menu	Downloads only the selected content items.
Download All option on Actions menu	Downloads all items listed on the search results page.
Select check boxes	Selects content items to be downloaded when the Download Selected button is clicked.

Download Files Screen

The Download Files screen is used to specify download options and the target directories for files being downloaded from the content server. To access this screen, click **Download Selected** or **Download All** on the Download Options on Search Results Pages (page 8-7).

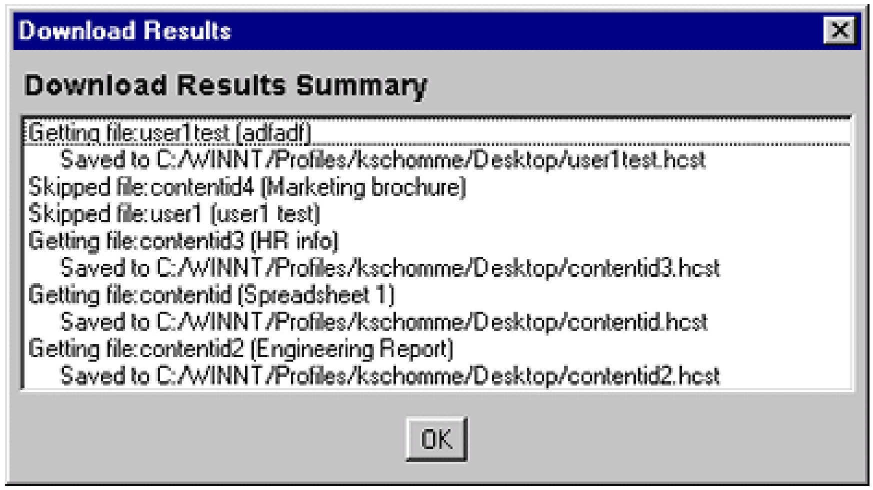


Feature	Description
Content ID field	The content ID of the file.
Title field	The descriptive title of the content item.
Web Viewable field	The path and file name of the content item's web-viewable file.
Native field	The file name of the content item's native file. This field is filled in when the Native option is selected.

Feature	Description
Type of file to download options	**Web Viewable—**Specifies that the web-viewable file is to be downloaded. **Native—**Specifies that the native file is to be downloaded.
Extract zip file contents check box	**Selected—**Files in zip format will be uncompressed when they are downloaded. **Clear—**Files in zip format will be downloaded as is.
Check out file check box	**Selected—**Content items will be checked out as well as downloaded. **Clear—**Content items will only be downloaded and will not be checked out. This check box is available only when the Native option is selected.
Download Location field	The directory and file name where the current file will be copied. Click the Browse button to navigate to and select the directory.
Progress bar	Shows the progress of the download as a percentage.
Download button	Downloads the current file to the specified directory.
Download All button	Downloads all files that have not been skipped to the specified directory. This button is not displayed if only one file was selected on the search results page.
Skip button	Excludes the current file from the download. This button is not displayed if only one file was selected on the search results page.
Cancel button	Closes the Download Files screen.

Download Results Summary

The download results summary displays a log of the downloaded files. This screen is displayed when the download process is complete.



Downloading Multiple Files

Use the following procedure to download and check out multiple content items using the download applet:

1. Locate the files to download by drilling down the hierarchical link structure (the “Library”) or by performing a search. For details refer to Chapter 5 (*Finding Files)*.

   The Download Search Results page is displayed (page 8-7).

2. To download all content items on the Search Results page, click **Download All**.

3. To download selected content items, select the corresponding **Select** check boxes and click **Download Selected**.

   The Download Files screen is displayed (page 8-8).

4. Select the type of file to download: **Web Viewable** or **Native**.

5. To uncompress zip files during the download process, select the **Extract zip file contents** check box.

6. If you selected the Native option and you want to check out the content items upon download, select the **Check out file** check box.

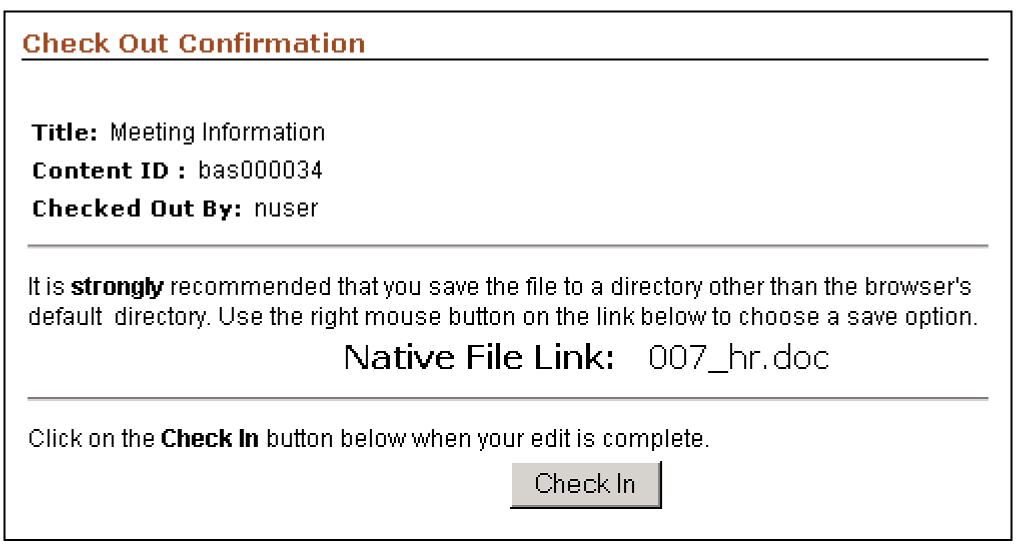
7. In the **Download Location** field, enter the path where you want the files to be copied. You can click **Browse** and navigate to the directory to select it.

8. If you want a different file name for the downloaded file, change the file name in the **Download Location** field. (This applies only to the current file; if you click **Download All**, all other files will retain their default file names.)
9. Click one of the following buttons:
   - ❖ **Download**—to download the current file only.
   - ❖ **Download All**—to download all selected files that have not been skipped (you will not be prompted for each file that was selected).
   - ❖ **Skip**—to not download the current file and go to the next selected file.
   - ❖ **Cancel**—to cancel the download.
10. If a file with the same file name already exists in the target location, you will be asked whether you want to overwrite it. Click a button to indicate whether you want to overwrite one or more files.

    When downloading is complete, the Download Search Results page (page 8-7) is displayed.
11. Click **OK**.

CHECK-OUT CONFIRMATION PAGE

The Check-Out Confirmation page is displayed after you have checked out a single content item successfully.



Feature	Description
Title field	The title of the content item that you checked out.
Content ID field	The content ID of the file that you checked out.
Checked Out By field	The login you used to check out the file.
Native File Link	Enables you to open or save a copy of the native file.
Check In button	Displays the content check-in form (page 7-3).

Chapter

9

WORKING WITH WORKFLOWS

OVERVIEW

This section covers the following topics:

ABOUT WORKFLOWS

A workflow specifies how content is routed for review and approval before it is released to the system. Users are notified by e-mail when they have a file to review.

This section covers the following topics:

Workflow Types

From a workflow participant's point of view, there are two types of workflows:

- ❖ A **basic** workflow defines the review process for specific content items, and must be initiated manually.
- ❖ In a **criteria** workflow, a file enters the workflow automatically upon check-in when its metadata matches predefined criteria.

Workflow Steps

Each workflow can include multiple review and notification steps, and multiple reviewers can be assigned to approve or reject the file at each step. For each step in a workflow, a set of users and a step type must be defined. The users defined for a step can perform only the tasks allowed for that step type:

Step Type	Description
Contribution	This is the initial step of a basic workflow. Contributors are defined when the workflow is created.
Auto-Contribution	This is the initial step of a criteria workflow. There are no predefined users involved in this step.
Review	Users can only approve or reject the file. Editing is not allowed.
Review/Edit Revision	Users can edit the file if necessary and then approve or reject it, maintaining a new revision.
Review/New Revision	Users can edit the file if necessary and then approve or reject it, creating a new revision.

Post-Process Workflow Options

Workflows or individual workflow steps can be set up to allow for items in review to be released into the system for indexing, searching, and viewing, even though the workflow to which they belong is not completed. This allows for greater flexibility in constructing workflows. For example, items in a workflow process can to be made available to others not in the workflow, or a workflow can be initiated to update the content information of an item without advancing the revision of that item.

Workflow Process

The workflow process is as follows:

- When a revision is approved by the minimum number of reviewers for a particular step, it goes to the next step in the workflow.
- If any reviewer rejects a revision, it goes back to the most recent contribution step for editing.
- When a revision is approved at the last step in the workflow, the content item is released to the system.
- A basic workflow containing multiple content items can be set up so that some items in the workflow may be released to the system before all of the revisions have completed the workflow.

Workflow Tasks

These are the most common workflow tasks that you will perform:

- Entering a File to a Workflow (page 9-9)
- Reviewing Revisions in a Workflow (page 9-10)
- Working with a Rejected Revision (page 9-11)

PARTICIPATING IN A WORKFLOW

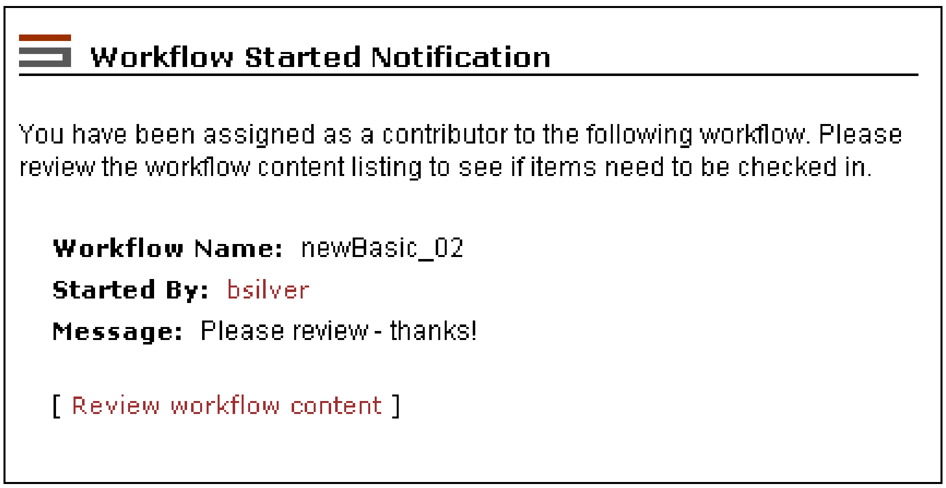
This section covers the following topics:

- Workflow Started Notification (page 9-4)
- Workflow Review Notification (page 9-5)
- Workflow Content Items Page (page 9-5)
- Reject Content Item Page (page 9-7)
- Workflow Content Item Reject Notification (page 9-8)
- Entering a File to a Workflow (page 9-9)

- ❖ Reviewing Revisions in a Workflow (page 9-10)
- ❖ Working with a Rejected Revision (page 9-11)

Workflow Started Notification

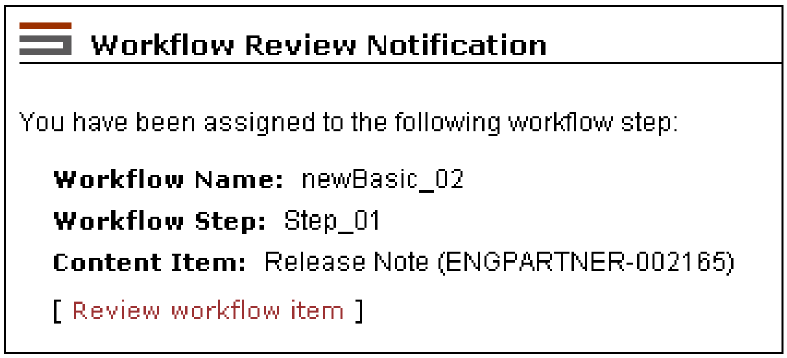
A workflow started notification message is e-mailed to you when you are assigned to check in a new file for a basic workflow. It is an automated message that you can use to identify the file that you need to check in and other workflow information.



Feature	Description
Workflow Name field	Identifies the workflow.
Started By field	Opens an e-mail to the person who initiated the workflow.
Message field	Displays a message from the person who initiated the workflow.
Review workflow content link	Opens the Workflow Content Items page (page 9-5).

Workflow Review Notification

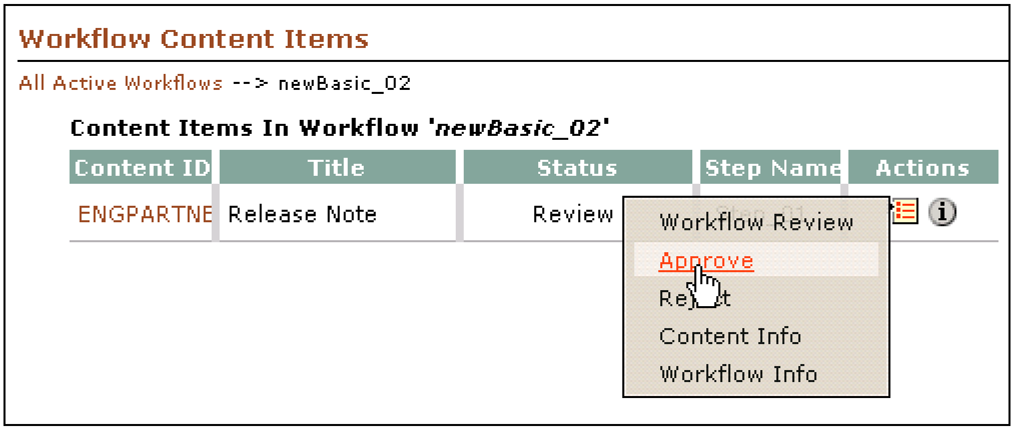
A workflow review notification message is e-mailed to you when you are assigned to review a revision in a workflow. It is an automated message that you can use to identify some workflow characteristics.



Feature	Description
Workflow Name field	Identifies the workflow.
Workflow Step field	Identifies the current step in the workflow.
Content Item field	Identifies the content item or items in the workflow.
Review workflow item link	Opens the Workflow Review page (page 9-17).

Workflow Content Items Page

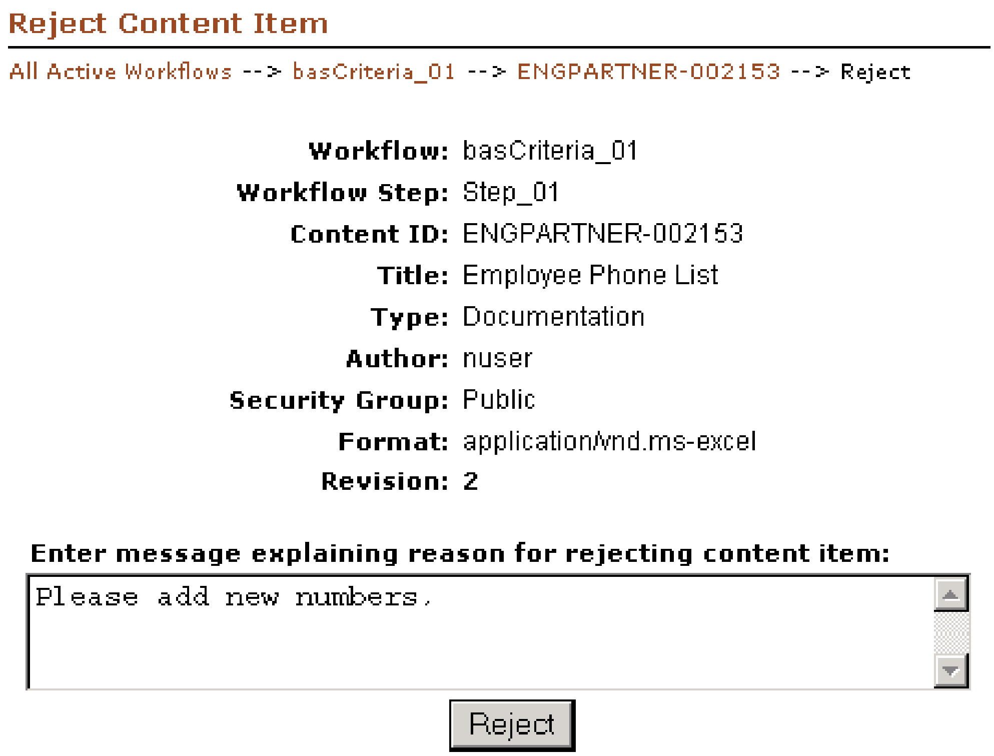
The Workflow Content Items page is used to identify which action to perform in the workflow. To access this page, click the **Review Workflow Content** link on a workflow started notification (page 9-4) or open the **Content Management** tray, click **Active Workflows**, and then the workflow name on the Active Workflows page (page 9-13).



Feature	Description
Breadcrumb links	Displays a hierarchical navigation within content server. Located just below the page title.
Content ID column	Click the content ID to display the web-viewable file.
Title	The title of the content.
Status column	The status of the revision. For details refer to Revision Status (page 6-4).
Step Name column	The name of the current workflow step.
Action icon ( )	Displays the actions (if any) that you can take on the content item: **Workflow Review**—Displays the Workflow Review page (page 9-17). **Approve**—Approves the revision. **Reject**—Rejects the revision and displays the Reject Content Item page (page 9-7). **Content Info**—Displays the content information page (page 6-6) for the revision. **Workflow Info**—Displays the Workflow Info for Item page (page 9-15) for the revision.
Info icon ( )	Displays the Workflow Review page (page 9-17) for the content item.

Reject Content Item Page

The Reject Content Item page is used to explain why you are rejecting a workflow revision. This page is displayed automatically when you reject a workflow item.

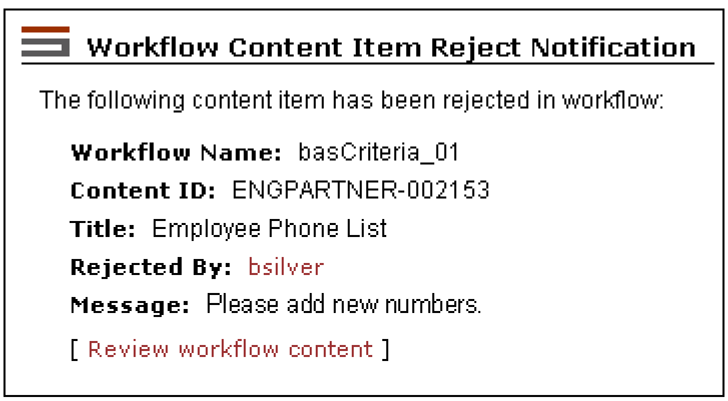


Feature	Description
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page title.
Workflow field	The name of the current workflow.
Workflow Step field	The name of the current workflow step.
Content ID field	The content ID of the content item.
Title field	The title of the revision.
Type field	The value associated with the Type metadata field.
Author field	The login associated with the user who checked in the file.

Feature	Description
Security Group field	The security group associated with the content item.
Format field	The formats corresponding to the file.
Revision field	The current revision of the content item.
Message field	Enables you to enter an explanation for why you are rejecting the revision. Include what should be done to ensure that the revision is approved in the future.
Reject button	Sends a workflow content item reject notification (page 9-8) to the previous contributor in the workflow.

Workflow Content Item Reject Notification

The workflow content item reject notification message identifies who rejected the revision and why it was rejected. When a revision is rejected and the Reject Content Item page (page 9-7) is filled out, this e-mail message is automatically sent to users assigned to the previous contribution step in the workflow.



Feature	Description
Workflow Name field	The name of the workflow.
Content ID field	The content ID of the rejected item.
Title field	The title of the rejected item.

Feature	Description
Rejected By field	The user name of the person rejecting the item. Click to send an e-mail to the person.
Message field	The message sent by the person rejecting the item.
Review workflow content link	Opens the Workflow Content Items page (page 9-5).

Entering a File to a Workflow

When a basic workflow is initiated, an e-mail message is sent to the contributors, who must check in the designated files as the first step in the workflow.

Use the following procedure to check in a file to begin a basic workflow:

1. Read the workflow started notification (page 9-4) message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items page (page 9-5) is displayed.
3. Select **Check Out** from the contextual menu under the Actions column.

   The check-out confirmation page (page 8-11) is displayed.
4. Check the content item into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Actions column on the Workflow Content Items page.
   - Open the **Content Management** tray, click **Active Workflows**, click the name of the workflow, and then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
5. Fill in the content check-in form.
   - If you select the **Revision Finished Editing** check box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow.
   - If you leave the **Revision Finished Editing** check box unchecked, the file is checked in but remains in Edit status instead of moving to GenWWW status. You will need to return to step 3 to check out the file and check it back in.

Tech Tip: If a document included in a workflow fails to convert in the check-in process, the content item will be set to Edit status automatically. To ensure that this does not occur, make sure that documents included in the workflow are valid for conversion.

6. Click **Check In**.

Reviewing Revisions in a Workflow

When the next step in a workflow is a review step, the reviewers receive an e-mail message.

Use the following procedure to review a file in a workflow:

1. Read the workflow review notification (page 9-5) message.
2. Click the **Review Workflow Item** link.

   The Workflow Review page (page 9-17) is displayed, indicating the actions that can be performed.

Note: For a reviewer step, you will be able to **approve** or **reject** the content item. For a reviewer/contributor step, you will be able to **check out**, **approve**, or **reject** the content item.

3. Do one of the following to review the file:
   - Review the file as it is displayed to the right of the Workflow Review panel.
   - Click the **Web Viewable** link to see a version of the content in your browser.
   - Click the **Native File** link to save a copy of the file in its original format.
   - Click the **HTML Rendition** link to view the file as HTML in your browser.
4. If you have reviewer/contributor permission and you would like to edit the file, click the **Check out** link in the Workflow Review panel to check out the content item for editing. Otherwise, continue with step 9.

   The check-out confirmation page (page 8-11) is displayed.
5. Get a copy of the original file and edit it. For details refer to chapter 8 (*Checking Out Files*).
6. Check the content item back into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.

- Open the **Content Management** tray, click **Active Workflows**, click the name of the workflow, and then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.

7. Fill in the content check-in form (page 7-3).
   - If you check the **Approve Revision** box, the revision moves from Edit status to GenWWW status and goes to the next step in the workflow when the required number of approvals is reached. Step 8 is not required.
   - If you leave the **Approve Revision** box unchecked, the revision is checked in but remains in Review status instead of moving to GenWWW status. You will still need to approve or reject the revision.
8. Click **Check In**.
9. Approve or reject the revision by clicking the appropriate link in the Workflow Review panel.
   - If the revision is approved by the appropriate number of reviewers, the content item goes to the next step in the workflow.
   - If the revision is rejected, the Reject Content Item page (page 9-7) is displayed so that the reviewer can enter a message explaining the reason for rejecting the content item. When a content item is rejected, it is sent back to the most recent workflow step that permitted contribution.

Working with a Rejected Revision

When a revision is rejected, the users assigned to the most recent contribution step receive an e-mail message.

Use the following procedure to edit a file that was rejected:

1. Read the workflow content item reject notification (page 9-8) message.
2. Click the **Review Workflow Content** link.

   The Workflow Content Items page (page 9-5) is displayed.
3. Select **Check Out** from the contextual menu under the Actions column.

   The check-out confirmation page (page 8-11) is displayed.
4. Get a copy of the original file and edit it. For details refer to chapter 8 (*Checking Out Files*).

5. Check the content item back into the system using one of the following methods:
   - If the check-out confirmation page is still displayed, click **Check In**.
   - Select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
   - Open the **Content Management** tray, click **Active Workflows**, click the name of the workflow, and then select **Check In** from the contextual menu under the Action column on the Workflow Content Items page.
6. Fill in the content check-in form (page 7-3).
   - If you check the **Revision Finished Editing** box, the file moves from Edit status to GenWWW status and goes to the next step in the workflow.
   - If you leave the **Revision Finished Editing** box unchecked, the file is checked in but remains in Review status instead of moving to GenWWW status. You will still need to approve the file.
7. Click **Check In**.

VIEWING WORKFLOW INFORMATION

This section covers the following topics:

- ❖ Workflow Information (page 9-13)
- ❖ Active Workflows Page (page 9-13)
- ❖ Workflow in Queue Page (page 9-14)
- ❖ Workflow Info For Item Page (page 9-15)
- ❖ Workflow Review Page (page 9-17)
- ❖ Viewing a List of Active Workflows (page 9-19)
- ❖ Viewing a List of Your Workflows (page 9-19)
- ❖ Viewing Workflow History and Information About a Workflow Step (page 9-20)
- ❖ Viewing Content Information (page 9-20)

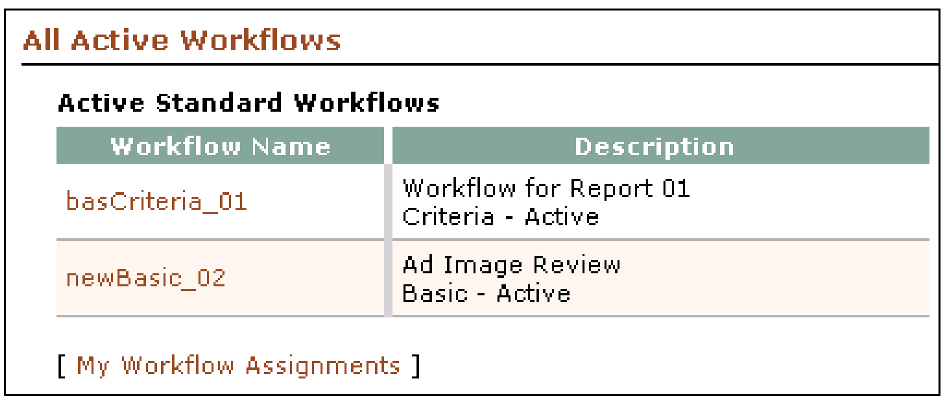
Workflow Information

There are several ways to view information about a content item in a workflow. Hyperlinks between workflow pages enable you to perform the following tasks:

- Viewing a List of Active Workflows (page 9-19)
- Viewing a List of Your Workflows (page 9-19)
- Viewing Workflow History and Information About a Workflow Step (page 9-20)
- Viewing Content Information (page 9-20)

Active Workflows Page

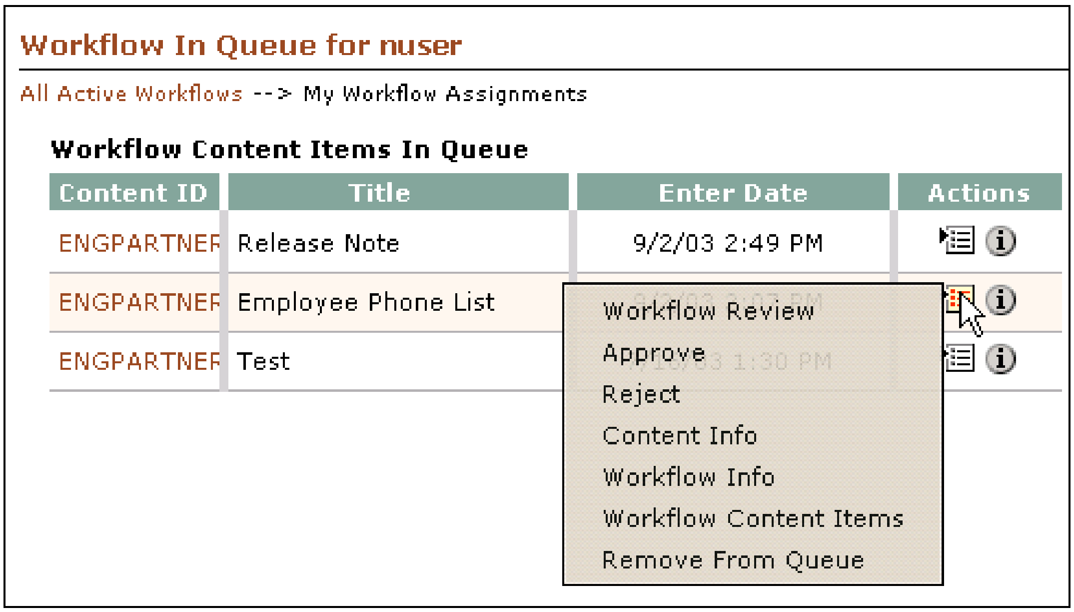
The Active Workflows page is used to view a list of all active workflows in the system. To access this page, click **Active Workflows** on the Content Management tray (page 4-16).



Feature	Description
Workflow Name column	The names of the active workflows in the corresponding security group. Clicking a link opens the Workflow Content Items page (page 9-5).
Description	A description of the workflow
My Workflow Assignments link	Displays the Workflow in Queue page (page 9-14).

Workflow in Queue Page

The Workflow in Queue page is used to view a list of all content items that you need to review. To access this page, click **My Workflow Assignments** under the My Stellent tray (page 4-22).

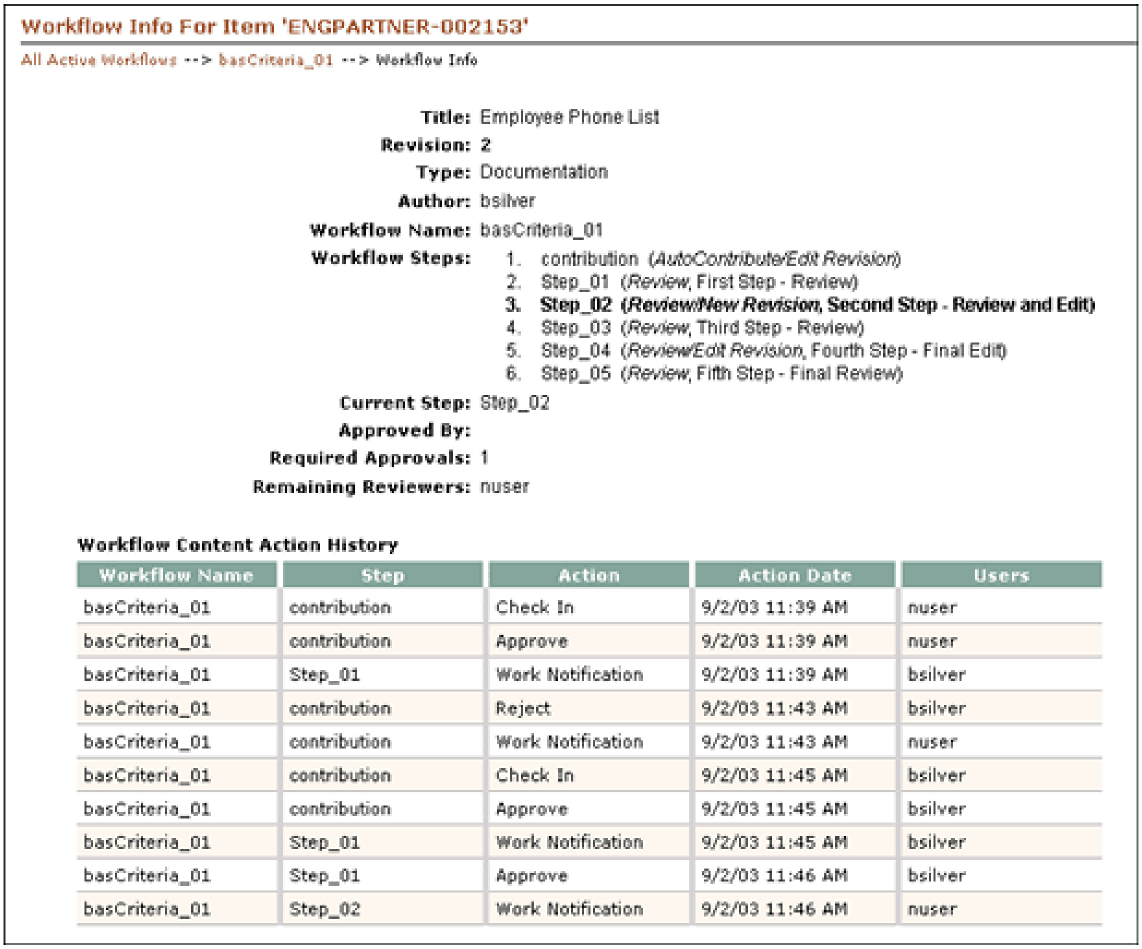


Feature	Description
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page title.
Content ID column	Displays the content ID and the title of each workflow item. Clicking the content ID link displays the web-viewable file.
Title	The title of the workflow.
Enter Date column	The date and time that the content item entered the current step.

Feature	Description
Action icon ()	Displays the actions (if any) that you can take on the content item: **Workflow Review**—Displays the Workflow Review page (page 9-17). **Approve**—Approves the revision. **Reject—**Rejects the revision and displays the Reject Content Item page (page 9-7). **Content Info—**Displays the content information page (page 6-6) for the revision. **Workflow Info—**Displays the Workflow Info for Item page (page 9-15) for the revision. **Workflow Content Items—**Displays the Workflow Content Items page (page 9-5) for the revision. **Remove from Queue—**Removes the content item from the Workflow in Queue page. (The content item is not deleted from the workflow.)
Info icon ()	Displays the Workflow Review page (page 9-17).

Workflow Info For Item Page

The Workflow Info page is used to identify where a revision is in the current workflow and to view the workflow history. To access this page, select **Workflow Info** from the contextual menu under the Actions column on the Workflow Content Items page (page 9-5) or the Workflow in Queue page (page 9-14), or by clicking **Workflow Info** on the Workflow Review page (page 9-17).

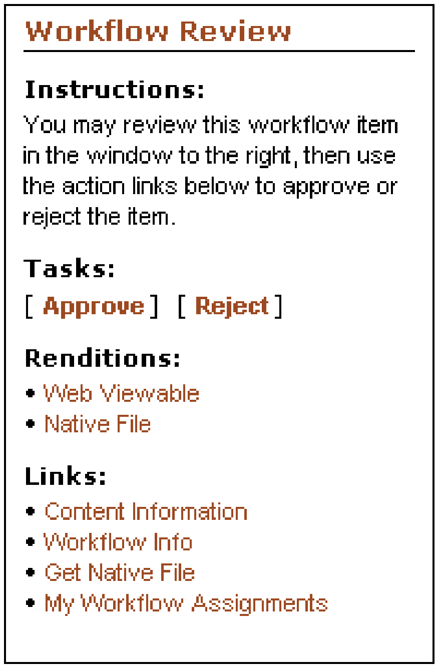


Feature	Description
Title field	The title of the content item.
Revision field	The current revision of the content item.
Type field	The value associated with the Type metadata field.
Author field	The login associated with the user who checked in the file.
Breadcrumb links	Displays a hierarchical navigation structure within the content server. Located just below the page title.
Workflow Name field	The name of the current workflow.

Feature	Description
Workflow Steps field	Lists all of the workflow steps. The current workflow step is in boldface type. The type of workflow step is shown in parentheses.
Current Step field	The current workflow step.
Approved by field	Lists the logins of the users who have approved the revision at the current workflow step.
Required Approvals field	Shows how many approvals are required at the current workflow step.
Remaining Reviewers field	Lists the users who have yet to review the revision for the current step.
Current Step's Additional Exit Condition field	Lists additional conditions beyond required approvals that must be met for the workflow step to be completed.
Workflow Content Action History field	Lists the actions that have been performed on the revision during the current workflow process.
Workflow Name column	The name of the workflow or sub-workflow.
Step column	The name of the workflow step.
Action column	The action that was performed on the revision.
Action Date column	The date and time that the action was performed.
Users column	The users that performed the action.

Workflow Review Page

The Workflow Review page offers several options for viewing and taking action on content in a workflow to which you have a responsibility. To access this page, click **Review Workflow Item** on the workflow review notification (page 9-5) or by selecting **Workflow Review** from the contextual menus under the Actions column on the Workflow Content Items page (page 9-5) or the Workflow in Queue page (page 9-14).



Feature	Description
Instructions field	Displays instructions on how to proceed with the workflow.
Tasks links	Links to specific tasks you can perform in the workflow. **Approve**—Approves the revision. **Reject**—Rejects the revision and displays the Reject Content Item page (page 9-7). **Check Out**—Checks out a file and displays the check-in confirmation page (page 7-19). This link is displayed only if the current step is a reviewer/contributor step.
Renditions	Links to specific tasks you can perform in the workflow. **Web Viewable**—Opens a version of the item in a format viewable in your browser, provided your system administrator has configured the content server to convert the item. **Native File**—Opens the item in your browser using the native application.

Feature	Description
Links	Links to information relating to the item or workflow. **Content Info**—Displays the content information page (page 6-6) for the revision. **Workflow Info**—Displays the Workflow Info for Item page (page 9-15) for the revision. **Get Native File**—Prompts for you to open the item in its native application, or save a copy of the item in its native format. **My Workflow Assignments**—Displays the Workflow in Queue page (page 9-14).

Viewing a List of Active Workflows

Use the following procedure to view a list of all active workflows in the system:

1. Open the **Content Management** tray.
2. Click **Active Workflows**.

   The Active Workflows page (page 9-13) is displayed.

Viewing a List of Your Workflows

Use the following procedure to view a list of workflows for which action is required from you:

1. Open the **My Stellent** tray.
2. Click **My Workflow Assignments**.

   The Workflow in Queue page (page 9-14) is displayed.
3. To remove content items from the list, select **Remove from Queue from** the contextual menu  under the Actions column. (The content item is not deleted from the workflow.)

Viewing Workflow History and Information About a Workflow Step

Use the following procedure to view workflow history and information about a workflow step:

1. Display either the Workflow Content Items page (page 9-5) or the Workflow in Queue page (page 9-14).
2. Select **Workflow Info** from the contextual menu under the Actions column.

   The Workflow Info for Item page (page 9-15) is displayed.

Viewing Content Information

Use the following procedure to view content information for a revision in a workflow:

1. Open the **My Stellent** tray.
2. Click **My Workflow Assignments**.

   The Workflow in Queue page (page 9-14) is displayed.
3. Select **Content Info** from the contextual menu under the Actions column.

   The content information page (page 6-6) is displayed.

Glossary

G

GLOSSARY

access

The level of permission a member has to a content item. See also permission (page G-13).

account

A Stellent security element that enables greater flexibility and granularity in a security structure than security groups provide. Content can be assigned to a particular account upon check-in, and users can access the content only if they have the appropriate permission to that account. See also security group (page G-19), documents without accounts (page G-7), #none (page G-12), and #all (page G-3).

account hierarchy

Structure whereby accounts are ordered in levels (for example, Company/Region/Store). Permission to a particular level in the account hierarchy also permits access to all of its sub-level accounts.

account prefix

Permission to an account prefix grants access to all accounts with that prefix. For example, permission to the "ACME" account provides access to all content checked in with any account that begins with *ACME*, such as "ACME/Midwest" or "ACME/Midwest/Store_1".

active report

A list that contains the results of a database query that is dynamically generated each time the report page is accessed. This type of report always reflects current content server information. Active reports are accessed through the hierarchical link structure (the "Library"). See also historical report (page G-9).

administration applets

See administration application (page G-2).

administration application

One of the following Java applications that are used for administration purposes: User Admin (page G-21), Workflow Admin (page G-23), Web Layout Editor (page G-22), Repository Manager (page G-16), Configuration Manager (system administrator only), Archiver (system administrator only).
These applications can be run as a Java applet from a Java-enabled browser, or in stand-alone mode from the content server computer.

administration rights

Permission to use an administration application (page G-2). A user must also have admin permission (page G-2) to at least one security group to be able to use the administration applications for which they have rights.

administrator

Person in an organization that manages all or part of a content server system. See also consumer (page G-5), contributor (page G-6), subadministrator (page G-19), and system administrator (page G-20).

admin permission

The permission level that allows users to perform the following tasks within a particular security group:
– viewing content
– checking in content
– checking out content
– getting a copy of content
– deleting content
– checking in content with another user specified as the author;
– using the User Admin, Workflow Admin, Web Layout Editor, and Repository Manager administration applications (the user must also have administration rights for the application).
See also read permission (page G-15), write permission (page G-23), and delete permission (page G-7).

admin role

A standard role (page G-17) that gives the user read, write, delete, and admin permission to all security groups and rights to all administration tools. This role does not allow a user to access the Admin Server. See also guest role (page G-9), contributor role (page G-6), and sysmanager role (page G-20).

Advanced Search

A function that enables users to search by full-text and/or all metadata fields, specify search operators, and specify how search results are to be displayed. See also Quick Search (page G-15).

alias

A name that represents one or more users in workflows and subscriptions. For example, the "Sales" alias could include all users in a sales department.

#all

A special account (page G-1) classification that can be used to assign a user a single permission level for all accounts.

alternate file

A web-viewable version of the primary file, or a version that can be converted to a web-viewable format upon check-in. The alternate file must be specified and checked in at the same time as the primary file. See also primary file (page G-14).

approve

To accept a revision in a workflow. See also reject (page G-15).

ascending sort order

Arrangement of data in a low to high sequence; for example, from A to Z or from 0 to 9. See also descending sort order (page G-7).

authentication

The process by which the content server system validates a user's logon information. The user name and password are compared against an authorized list. If the system detects a match, access is granted to the extent specified in the permissions list for that user.

authorization type

The way that Stellent groups users, depending on how their user attributes are defined: local user (page G-11), global user (page G-9), or external user (page G-8). Also referred to as *user type*.

automatic numbering

Assigning content IDs automatically in sequential order as new content items are checked in. This is an optional content server feature that can be enabled or disabled in the System Properties utility or the Admin Server.

autonumber prefix

An optional prefix that is placed before the sequential portion of the content ID when automatic numbering (page G-4) is enabled.

basic subscription

A subscription to an individual piece of content by content ID. See also criteria subscription (page G-6), forced subscription (page G-8), and open subscription (page G-13).

basic workflow

A type of workflow where specific content items are entered into a workflow by an administrator. See also criteria workflow (page G-6).

caption

See field caption (page G-8).

check in

To submit a file to the content server file repository.

check out

To lock a content item in the content server file repository so that no other users can revise it. Other users can still view and get a copy of a checked out content item. See also undo check-out (page G-21).

check out and open

A feature that enables users to check out and open content items directly in a WebDAV-compliant native application from Stellent Content Server. This feature requires WebDAV to be enabled.

child

A page or folder that is one level lower in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also parent (page G-13).

choice list

See option list (page G-13).

consumer

A content server user who only needs to find, view, and/or print content. See also contributor (page G-6), subadministrator (page G-19), and administrator (page G-2).

consumption site

A website that content consumers use to view content. Content contributors use a different website (a contribution site) to check in content.

content

A collective term for the content items in the Content Server repository.

content ID

A standard, required metadata field that provides a unique identifier for each content item.

content information

See metadata (page G-11).

content item

A file that has been checked in to the Content Server repository. A content item includes a primary file (page G-14) and metadata (page G-11), and can include an alternate file (page G-3).

content refinery

See Inbound Refinery (page G-10).

content repository

The place where content files are stored. Stellent Content Server uses two file repositories: one for the native files and one for the web-viewable files.

content type

A designation used to group similar content by category (for example, “Invoices”).

contribution site

A website that content contributors use to check in content. Content consumers access a different website (a consumption site) to view the content.

contributor

(1) A content server user who creates, revises, and collaborates on documents. See also consumer (page G-5), subadministrator (page G-19), administrator (page G-2).
(2) A user who submits a content item to a basic workflow.

contributor role

A standard role (page G-17) that gives the user read and write permission (RW) to the Public security group. See also guest role (page G-9), admin role (page G-3), and sysmanager role (page G-20).

conversion

The process of changing an electronic file to a different file format (for example, changing a Microsoft Word document into PDF or HTML format).

core

The basic components of Stellent Content Server.

criteria subscription

A subscription to a group of content items based on metadata criteria. See also basic subscription (page G-4), forced subscription (page G-8), and open subscription.

criteria workflow

A type of workflow where a content item automatically enters the workflow if the security group and one metadata field match predefined criteria. See also basic workflow (page G-4) and sub-workflow (page G-20).

current revision

See latest revision (page G-10).

custom metadata field

An administrator-defined metadata field (page G-12).

Deleted status

The revision status (page G-17) that indicates that the revision has been deleted and is waiting to be completely removed from the content server during the next indexing cycle.

delete permission

The permission level that allows users to perform the following tasks within a particular security group:

– viewing content
– checking in content
– checking out content
– getting a copy of content
– deleting content.

See also read permission (page G-15), write permission (page G-23), and admin permission (page G-2).

dependent choice list

An option list in which the options depend on what is selected in a different option list. For example, if there is an option list for the Continent field and another option list for the Country field, the available choices in the Country option list depend on which Continent is selected.

descending sort order

Arrangement of data in high to low sequence; for example, from Z to A or from 9 to 0. See also ascending sort order (page G-3).

documents without accounts

A special account (page G-1) classification that assigns a permission level for content items that do not have an account specified. Same as #none (page G-12).

document type

A designation used to group similar documents by category (for example, “Invoices”).

Done status

The revision status (page G-17) that indicates that the revision has been indexed and is waiting to be released on its specified release date.

download

To copy a file from the content server to your local hard disk.

download applet

An optional Java applet that enables users to download multiple content items at the same time. The content items can also be checked out during the download process. See also multiple file check-out (page G-12).

Edit status

The revision status (page G-17) that indicates that the revision is at the initial contribution step of a workflow.

expiration date

The date and time when a revision is no longer available for searching or viewing in the content server.

Expired status

The revision status (page G-17) that indicates that the revision is no longer available for searching or viewing in the content server.

external collection

A set of content files that are indexed and stored in a separate Verity collection rather than in the content server database.

external user

An authorization type (page G-4) where user security attributes (password, roles, and accounts) are stored in an external storage system. External users might use a Microsoft network login or another type of provider (LDAP) login. See also local user (page G-11) and global user (page G-9).

field caption

The name of a metadata field as it appears on web pages. For example, “Content ID” is the field caption, while the internal field name (page G-10) is “dDocName”.

file format

The structure of a file. The file format is determined by the application used to create the file, and can typically be determined by the file extension (such as *.pdf* or *.doc*).

forced subscription

A subscription where users and/or aliases are assigned to the subscription by an administrator. If individual users are assigned, each user can unsubscribe if they wish. If an alias is assigned, the users in that alias cannot unsubscribe. See also open subscription (page G-13), basic subscription (page G-4), and criteria subscription (page G-6).

full-text indexing

The process of creating a searchable index that includes every word in a file.

full-text search

A search that compares the query expression against every word in a file. See also metadata search (page G-12).

full-text search operator

A word or symbol that refines the query expression for a full-text search (for example, AND, OR, and double quotation marks ").

GenWWW status

The revision status (page G-17) that indicates that the revision is being converted to web-viewable format or is being indexed, or has failed conversion or indexing.

global user

An authorization type (page G-4) where user security attributes (password, roles, and accounts) are stored on master content server, but the user has access to proxied content servers as well. Global users are considered "lightly managed" users, as this authorization type limits some of the user functions in order to enhance scalability and performance. See also local user (page G-11) and external user (page G-8).

guest portal page

The Stellent web page that users see after they start Stellent Content Server but before they log in. See also login portal page (page G-11).

guest role

A standard role (page G-17) that gives the user read permission (R) to the Public security group. A login is not required to access content items in the security groups for which the *guest* role has permission. This role is assigned to anonymous users by default. See also contributor role (page G-6), admin role (page G-3), and sysmanager role (page G-20).

historical report

A list that contains the results of a database query that was performed at a specific date and time. This type of report provides a "snapshot" of content server information as it existed at a particular moment. Historical reports are built with the Web Layout Editor and accessed through the Library. See also active report (page G-1).

Home page

See guest portal page (page G-9) and login portal page (page G-11).

Idoc Script

Stellent's proprietary server-side script language that is used to modify the functionality and look-and-feel of Stellent products. Idoc Script tags are in the format <$script$>.

Inbound Refinery

Software included with Stellent Content Server that converts native files to web-viewable files, along with specific conversion add-on modules (such as PDF Converter or XML Converter).

index

The name of the web page at the highest level of the Library hierarchy in the Web Layout Editor. All other pages are at a lower level than (are children of) the index page.

Indexer

Software included with Stellent Content Server that full-text indexes files and stores the indexed words in a database. When you do a full-text search for content, the Content Server looks for the search terms in this index. See also search index (page G-18).

information field

See metadata field (page G-12).

instance

A single copy of Stellent Content Server. Multiple content server instances may be running on the same computer.

internal field name

The name of a metadata field as it appears on web pages. For example, "Content ID" is a field caption (page G-8), while the internal name of the field is "dDocName".

latest notification

The most recent date and time that a user was sent a subscription notification e-mail for a particular content item.

latest notification use

The most recent date and time that a user accessed a particular content item from a subscription notification e-mail.

latest revision

The most recent version of a content item.

Library
A hierarchical structure of links that organizes content items based on metadata criteria. Users can “drill down” through the levels of the Library to find content items they are looking for. The Library hierarchy is built using the Web Layout Editor application, and is accessed by users through the Library link in the portal.

locale
A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues, such as date formatting and full-text indexing. See also system locale (page G-20) and user locale (page G-22).

local page
A type of link in the hierarchical link structure (the “Library”) that links to another web page that contains more local page links, URL links, and/or query links.

local user
An authorization type (page G-4) where user security attributes (password, roles, and accounts) are stored on master content server, and the user is included in all local content server functions. See also global user (page G-9) and external user (page G-8).

log in
To gain access, or sign in, to the Stellent system. Logging in requires users to identify themselves by entering their user name and password, which Stellent uses to grant security permissions to content and rights to administrative functions.

login
See user name (page G-22).

login portal page
The Stellent web page that users see after they log in. See also guest portal page (page G-9).

major revision
The primary revision label (for example, the number portion of the revision sequence 1a, 1b, 2a, 2b). See also minor revision (page G-12).

metadata
Information about a content item, such as title, author, security group, etc. Metadata is used to describe, find, and group content items. Also referred to as *content information*.

metadata field

A field on a web page that is used to define metadata during check-in, or to define search criteria. Also referred to as *content information field*.

metadata propagation

A Folders component feature that enables contributors to copy default metadata values from parent folders to subfolders and content items.

metadata search

A search that compares the query expression against metadata field values. See also full-text search (page G-9).

minor revision

The secondary revision label (for example, the letter portion of the revision sequence 1a, 1b, 2a, 2b). See also major revision (page G-11).

multiple file check-in

An optional feature of Stellent Content Server that enables users to check in multiple content items as a single compressed zip file. See also upload applet (page G-21).

multiple file check-out

An optional feature of Stellent Content Server that enables users to check out and download multiple content items at the same time. See also download applet (page G-7).

native application

A software application that was used to create an original file that was checked in to the content server (for example, Microsoft Word or Adobe Photoshop).

native file

The original file that is checked into the content server file repository. See also primary file (page G-14).

native file format

The file format (page G-8) that an original file was created in.

#none

A special account (page G-1) classification that assigns a permission level for content items that do not have an account specified. Same as documents without accounts (page G-7).

notification

The act of informing users through e-mail. In Stellent Content Server, e-mail notification is used in subscriptions and workflows.

open subscription

A type of subscription where users manually subscribe to content items through a basic or criteria subscription. See also forced subscription (page G-8), basic subscription (page G-4), and criteria subscription (page G-6).

option list

A drop-down list on a Stellent web page from which users can choose an item.

original file name

The name of the native file that was checked in as the primary file.

page properties

The page title, page description, security group, and links for a specific web page defined in the Web Layout Editor.

parent

A page or folder that is one level higher in a hierarchical structure (such as a page in the Web Layout Editor or a folder in the Folders component). See also child (page G-5).

pass through

The process of storing a native file in the *weblayout* repository without converting it to a web-viewable format. Inbound Refinery may pass through a file if it cannot be converted (for example, because the native application is not supported), if a pass-through file format is specified during check-in, or if there is no need to convert the file (for example, if the original file is already in PDF format).

Pending status

The revision status (page G-17) that indicates that the revision is in a basic workflow and is waiting for approval of all revisions in the workflow.

permission

The access that a user has to a particular security group or account. See also read permission (page G-15), write permission (page G-23), delete permission (page G-7), and admin permission (page G-2).

persistent URL

The URL (web address) that always points to the most recent version of a content item. When a new revision is checked in, the file name of the previous revision is changed to reflect the revision number (for example, 002050~1.pdf, 002050~2.pdf, etc.), and the new revision takes on the content ID as the file name (for example, 002050.pdf). The directory location of the file remains the same as long as the security group, Type, and account are not changed.

personal URL

A link from the portal navigation bar (page G-14) to a URL (web address) that a user accesses frequently.

Portal Design

A Stellent Content Server feature that enables users to personalize their portal navigation bar (page G-14).

portal navigation bar

The customizable navigation area on the left side of most Stellent web pages. See also portal page (page G-14)

portal page

See guest portal page (page G-9) and login portal page (page G-11).

primary file

The original file that is checked in to the Content Server repository. See also native file (page G-12) and alternate file (page G-3).

privilege

See permission (page G-13).

propagation

See metadata propagation (page G-12).

Public

A predefined security group (page G-19). By default, no login is required to view Public content.

query

See search (page G-18).

query expression

A statement that specifies the criteria to be matched during a search. See also search criteria (page G-18).

query link

A link on a Library (page G-11) page that displays a list of content items that meet the specified search criteria.

query result page

See search results page (page G-18).

Quick Help

A button on Stellent web pages that provides context-sensitive help.

Quick Search

A function that enables users perform a full-text search from the portal navigation bar (page G-14). See also Advanced Search (page G-3).

read permission

The permission level that allows users to perform the following tasks within a particular security group:

– viewing content
– getting a copy of content.

See also write permission (page G-23), delete permission (page G-7), and admin permission (page G-2).

refinery

See Inbound Refinery (page G-10).

reject

To disapprove a revision in a workflow. See also approve (page G-3).

release date

The date and time when a revision is available for searching and viewing in the content server.

Released status

The revision status (page G-17) that indicates that the revision is available in the content server.

rendition

A particular file associated with a content item, such as the primary file (page G-14), alternate file (page G-3), or web-viewable file (page G-22).

report

A list that contains the results of a content server database query. There are two types of reports, active report (page G-1) and historical report (page G-9), which are built with the Web Layout Editor and accessed through the Library (page G-11).

repository

See content repository (page G-5).

Repository Manager

An administration application (page G-2) that is used to:
– manage content items (view status, delete revisions, etc.)
– create criteria subscriptions and assign users to subscriptions
– update and rebuild the search index.

required field

A metadata field (page G-12) that must have a value for a content item to be checked in.

reviewer

A user who can approve or reject a workflow revision but cannot check it out for editing. See also reviewer/contributor (page G-16).

reviewer/contributor

A user who can approve, reject, and check out a workflow revision for editing. See also reviewer (page G-16).

reviewer/contributor step

A type of workflow step where users can approve or reject a revision and check it out for editing. See also reviewer step (page G-16).

reviewer step

A type of workflow step where users can approve or reject a revision but cannot check it out for editing. See also reviewer/contributor step (page G-16).

Review status

The revision status (page G-17) that indicates that the revision is in a workflow and is being reviewed.

revision

A new or revised version of a content item. By default, revisions are numbered sequentially starting with Revision 1, and every time the content item is checked out and checked in again, the revision number is incremented by one.

revision history

A record of all revisions for a particular content item. The files and metadata can be accessed for all previous revisions that have not been deleted.

revision status

The status of a revision in the content server. The revision status can be Done, Edit, GenWWW, Released, Pending, Expired, Deleted, or Review.

rights

The access that a user has to any of the following administration applications:
– User Admin (page G-21)
– Repository Manager (page G-16)
– Workflow Admin (page G-23)
– Web Layout Editor (page G-22).
See also subadministrator (page G-19).

role

A set of permissions for each security group. Each user is assigned one or more roles that define their access to content. There are four predefined roles:
– guest role (page G-9)
– contributor role (page G-6)
– sysmanager role (page G-20)
– admin role (page G-3).
See also permission (page G-13) and security group (page G-19).

R permission

See read permission (page G-15).

RW permission

See write permission (page G-23).

RWD permission

See delete permission (page G-7).

RWDA permission

See admin permission (page G-2).

saved query

A link from the portal navigation bar (page G-14) to a particular search that a user performs frequently.

score

A search results sorting option that rates each file with a number to determine how closely it matches the full-text search criteria. The higher the score, the closer the match.

search

To retrieve a list of content items that match specified criteria.

search criteria

The metadata values and/or full-text words and phrases to be matched during a search. See also query expression (page G-15).

search engine

Software included with Stellent Content Server that performs metadata and full-text searches. See also search index (page G-18).

search index

A set of files that contain metadata information and the full-text indexes. The search index is created by the Indexer (page G-10) and is read by the search engine (page G-18).

search operator

A word or symbol that can be used in a query expression to refine the search criteria (for example, AND, OR, NOT, Substring, Matches, etc.).

search results

A list of content items that match the search criteria.

search results page

Standard Stellent page that displays the results of a query. Also referred to as *query result page*.

Secure

A predefined security group (page G-19). By default, only the system administrator has access to this security group.

security group

A set of content items to which users are granted permission based on their roles. Each content item is assigned to a security group during check-in. There are two predefined security groups: Public (page G-14) and Secure (page G-19).

security model

The specific configuration of security groups, roles, and accounts that is defined for an organization.

self-registration

A function that enables users to create their own logins (user name and password).

sort order

The order in which content items are displayed on a search results page. By default, search results can be sorted by release date (page G-15), title (page G-20), or score (page G-18), and each of these options can be displayed in ascending sort order (page G-3) or descending sort order (page G-7).

status

See revision status (page G-17).

step

A sequential stage in a workflow that defines which users can review, approve, and reject a revision. There are two types of steps: reviewer step (page G-16) and reviewer/contributor step (page G-16).

subadministrator

A user who has rights to at least one administration application (page G-2). See also consumer (page G-5), contributor (page G-6), administrator (page G-2), and system administrator (page G-20).

subscribe

To indicate that you wish to be notified by e-mail when a new revision of a particular content item is checked in to the Content Server repository.

subscriber

A user who is subscribed to a content item.

subscription

A function that notifies subscribed users by e-mail when a particular content item has been revised. See also criteria subscription (page G-6), basic subscription (page G-4), forced subscription (page G-8), and open subscription (page G-13).

sub-workflow

A type of workflow that does not have an initial contribution step. A file can enter a sub-workflow only through a jump from a criteria workflow (page G-6).

sysmanager role

A standard role (page G-17) that gives the user read permission (R) to the Public and Secure security groups, and access to the Admin Server. See also guest role (page G-9), contributor role (page G-6), and admin role (page G-3).

system administrator

A user who has full administrative permission (page G-13) and administration rights (page G-2) to manage the Stellent system.

system locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues on a system-wide basis. See also user locale (page G-22).

Tamino

An alternate Indexer (page G-10), search engine (page G-18), and database that can be used with Stellent Content Server to store content in XML format. See also Verity (page G-22).

thumbnail

A miniature representation of a page or image. In Stellent Content Server, thumbnails are created by the Inbound Refinery and displayed on search result pages.

title

A descriptive name for a content item.

token

A piece of Idoc Script that defines variable users in a workflow.

toolbar

The set of navigation links at the top of most Stellent web pages.

undo check-out

To cancel a content item check-out without creating a new revision.

unsubscribe

To cancel a subscription (page G-20) to a content item.

update

To modify the metadata for a revision without checking out the content item or adding a revision.

upload applet

An optional Java applet that enables users to check in multiple content items as a single compressed zip file. See also multiple file check-in (page G-12).

user

A person who has been assigned a user name and password for Stellent Content Server.

User Admin

An administration application (page G-2) that is used to manage content server users and security access.

user ID

See user name (page G-22).

user information

Information about a user, such as the user name, full name, e-mail address, etc.

user information field

A field that is used to define user information on the User Profile page.

user locale

A setting that specifies the language of the content server interface and defines how the content server handles language-specific issues for an individual user. See also system locale (page G-20).

user login

A user name and password used to gain access to Stellent Content Server.

user name

The name of a user, as recognized by Stellent Content Server (for example, "mjohnson").

User Profile

Personal information about a user, such as the user name, full name, e-mail address, etc. User information can be changed by an administrator through the User Admin administration application, or by the user on their User Profile page.

user type

See authorization type (page G-4).

Verity

The standard Indexer (page G-10) and search engine (page G-18) included in Stellent Content Server. See also Tamino (page G-20).

WebDAV (Web-Based Distributed Authoring and Versioning)

A protocol that provides a way to remotely author and manage content using clients that support WebDAV. For example, you can use Microsoft Windows Explorer to check in, check out, and modify content in the Stellent repository rather than using Stellent's web browser interface.

Web Layout Editor

An administration application (page G-2) that is used to create the Library hierarchy, define reports, modify search result pages, and update the portal page.

web-viewable file

A file in a format that can be viewed using a web browser, such as PDF or HTML.

workflow

The process that routes a file for review and approval before it is released to the content server. Users are notified by e-mail when they have a file to review. There are three types of workflows: basic workflow (page G-4), criteria workflow (page G-6), and sub-workflow (page G-20).

Workflow Admin

An administration application (page G-2) that is used to set up and manage workflows.

work in progress

A revision that is in GenWWW status (page G-9) or Done status (page G-7).

write permission

The permission level that allows users to perform the following tasks within a particular security group:

- viewing content
- checking in content
- checking out content
- getting a copy of content.

See also read permission (page G-15), delete permission (page G-7), and admin permission (page G-2).

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